



# **Core HR Professional Users Manual**

## **V19.1**

**(1st edition)**

# Contents

<b>Contents .....</b>	<b>2</b>
<b>General Information.....</b>	<b>5</b>
Quick Guide to the Changes in the Core Professional User Manual.....	7
Quick Guide to the Changes in the Core Professional User Manual.....	8
<b>Accessing the System.....</b>	<b>9</b>
<b>Core Personnel System Overview .....</b>	<b>10</b>
Navigating in Core .....	12
Using the Mouse .....	12
Using the Keyboard .....	14
Standard Toolbar .....	14
View Icon Description.....	14
<b>Chapter 1- Post Management.....</b>	<b>16</b>
The Basic Principles of Post Management .....	16
<b>Post Management Process .....</b>	<b>20</b>
Managing Posts at Cardiff .....	21
Quick GL Checklist .....	22
Option 1:- Creating a new post .....	23
Option 2:- Planning and Authorising against an existing post .....	26
Option 3:- Maintaining an FTE for an existing post .....	28
Adding the Post Cost Allocation .....	31
Assigning the Terms & Conditions profile to the post .....	34
Assigning allowances against the post.....	38
Assigning the Post Pension Scheme.....	39
Post checks / User Defined Fields .....	41
Creating an unpaid post.....	43
Creating a Post for an Internal Secondment .....	45
Creating a Post for an External Incoming Secondment.....	48
Creating a Post for an Internal Outgoing Secondment .....	50
Creating a Post for a CAIRD Pre-Sessional Tutor.....	52
<b>Chapter 2 - Planning &amp; Authorising an appointment .....</b>	<b>55</b>
Planning the appointment.....	56

Authorising a Post.....	59
Making a Post Dormant / Re-activating a Post .....	61
<b>Chapter 3 – Changes .....</b>	<b>62</b>
Changing Personal Details.....	64
Changing a Cost Allocation.....	66
To Change the Cost Allocation of an Existing Appointment .....	66
To Change the Cost Allocation of a Post's Future Appointments .....	69
Adding Data to a User Defined Field .....	72
Changing Shift Types.....	74
Updating Semester Time Only Employees.....	77
Recording Shift Patterns for Hourly/Variable Staff .....	79
Changing a Job Title .....	80
Assigning Organisational Roles to an employee .....	82
Amend an Organisational Role/Change Line Managers .....	84
To End/Amend an Organisational Role.....	86
Hierarchy Amendments - Duplicating/Copying Posts .....	87
Making Amendments to the Hierarchy .....	87
To create a new Division/Department within your School/Professional Service hierarchy .....	90
Seeing Future Changes to be made by PSC .....	91
How to see a History of Changes.....	92
How to see Changes in Salary .....	94
Incremental Date.....	95
<b>Chapter 4 - Recording Leave &amp; Absence .....</b>	<b>96</b>
Planned Leave .....	96
Sickness Absence .....	96
Adding Sickness Absence to an Employee Record in Core Time .....	98
Recording Fit Note Absences .....	100
Phased Return .....	102
Unpaid Leave .....	103
Sickness Management User Defined Fields.....	104
Viewing Bradford Factor Scores.....	107
Running a Bradford Factor Report via Business Objects.....	108
Checking Annual Leave Entitlements in Core Time .....	110
Amending Leave Entitlement in Core Time .....	112

Leave Balance Recalculation.....	115
<b>Chapter 5- Probation .....</b>	<b>116</b>
Entering Appraisal Data to a UDF.....	119
Probation and Appraisal Report .....	120
<b>Frequently Asked Questions .....</b>	<b>121</b>
<b>Appendices .....</b>	<b>123</b>
Appendix 1- Organisational Roles.....	123
Appendix 2- Absence Reason Codes within Core Time.....	128
Appendix 3 - Time Codes within Core Time .....	130
<b>Appendix 4 - Where Do I find? – Tips to help you navigate around the system.....</b>	<b>132</b>

## General Information

Core is an integrated HR & Payroll system that enables both post and employee management, employee payments and absence management. Core was introduced as a brand new system in February 2013 and since March 2013 has been in use across the University.

The modules currently implemented include:

- Core Personnel
- Core Pay
- Core Time
- Core Portal

As of September 2013 ongoing work continues to implement manager requests in a new version of Core Portal, Core HESA, Core Training and Core Performance Management/Development.

Further development work will see the implementation of the Core Budget and Core Health and Safety modules.

Core is supported by the MISSC Team within HR and by the Cardiff People project team.

Queries regarding day to day use of the system or how to undertake specific tasks should be directed to [People@cardiff.ac.uk](mailto:People@cardiff.ac.uk).

### **IMPORTANT INFORMATION RE: UPGRADE:**

Due to the upgrade of the system to Version 19, there will no longer be reference to Primary and Secondary appointments for individuals who have multiple appointments. Instead the employees' main appointment will hold a substantive date against it, and this date will normally be the start date of their appointment. If this post was to end then their other (non-substantive) appointment becomes their main, substantive appointment. The date for this will show as being the day after the previous appointment ended.

**PLEASE NOTE: Version 19 shows an end appointment button, (as shown on the bottom right hand side of the screen below). You are NOT to use this under any circumstances, this is for the People Services Centre use only.**

**Appointment Details**

Personnel No. 10144027 Multiple Appointments Exist ☒

Forename Rupert Show My Current

Surname Dear

**Appointments**

Appointment Status	Appointment ID	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Commenced	800484-2	01-APR-2014		CARDIFF BUSINESS SCHOOL	LECTURER	FIXED TERM	
Commenced	504305-1	01-FEB-2014		CLAWS ACADEMIC	LECTURER	FIXED TERM	01-FEB-2014

Report To Manager Probation Expiry Date

Fix Point Review Date 1

Internal Extension No Review Date 2

Leaving Code Probation Extension Date

Leaving Destination Extension Reason

Location After Leaving Probation Completion Date

Ending Reason

View Appointment Amend Appointment Appointment Details **End Appointment**

## Quick Guide to the Changes in the Core Professional User Manual

<b>CHANGES TO THE CORE PROFESSIONAL USER MANUAL</b>	
<b>TASK</b>	<b>PAGE</b>
Important Information ( <b>New Page</b> )	6
Navigating Core ( <b>New Screenshots</b> )	12-13
Post Management ( <b>New Information</b> )	16-19
Creating a Post ( <b>Updated and Additional Information</b> )	23-24
Maintain FTE ( <b>Updated Information</b> )	28-29
Quick GL Checklist ( <b>New Information</b> )	22
Terms and Conditions ( <b>Additional Information</b> )	35
Planning and Authorising against existing post ( <b>Updated and Additional Information and New Screenshots</b> )	26-27
Pensions ( <b>Table updated (removal of 5005) and new information</b> )	39-40
Creating an Unpaid Post ( <b>Updated and Additional Information</b> )	43-44
Making a Post dormant/Re-activating a Post ( <b>New Page</b> )	61
User Defined Field (UDF) list ( <b>New Page</b> )	73
Amend Organisational Role ( <b>New Page</b> )	84-85
Creating a Post for an Internal Secondment ( <b>New Page</b> )	45-47
Creating a Post for an Internal Outgoing Secondment ( <b>New Page</b> )	50-51
Creating a CAIRD Pre-sessional Tutor Post ( <b>New Page</b> )	52-54
Probation and Appraisal ( <b>Updated Screenshots</b> )	117-119
Phased Return ( <b>Point 3 Information Updated</b> )	102
Sickness Management UDF ( <b>New Screenshot</b> )	104-106
Where do I Find? ( <b>New Page</b> )	132

## Quick Guide to the Changes in the Core Professional User Manual

<b>CHANGES TO CORE (FOLLOWING UPGRADE TO VERSION 19)</b>	
<b>TASK</b>	<b>PAGE</b>
Adding Post Cost Allocation <b>(New Screenshots and Additional Information)</b>	31-33
Changing Post Cost Allocation <b>(New Screenshot and Information)</b>	66-68
Changing Cost Allocation for a posts future appointment <b>(New Screenshots)</b>	69-71
Changing Personal Details <b>(New Screenshots and Information)</b>	64-65
How to See History of Changes <b>(New Screenshots and Information)</b>	92-93
Information on Substantive/Non Substantive Appointments. <b>(New terminology for Primary and Secondary posts – New Information)</b>	97
Adding a Sickness Record for an Employee <b>(New Screenshots and Additional Information)</b>	98-99
Recording Fit Note Absences <b>(Additional Information and New Screenshot)</b>	100-101
Unpaid Leave <b>(New information and Screenshot)</b>	103
Changing Shift Types <b>(No change to manual pages but able to record against multiple appointments)</b>	74-76
Recording Shift Pattern for hourly/variable staff <b>(No change to manual pages but able to record against multiple appointments)</b>	79
Updating Semester Time Only Employees <b>(No change to manual pages but able to record against multiple appointments)</b>	77-78



## Accessing the System

To gain access to Core you must have completed an access request form which is available on the HR website at

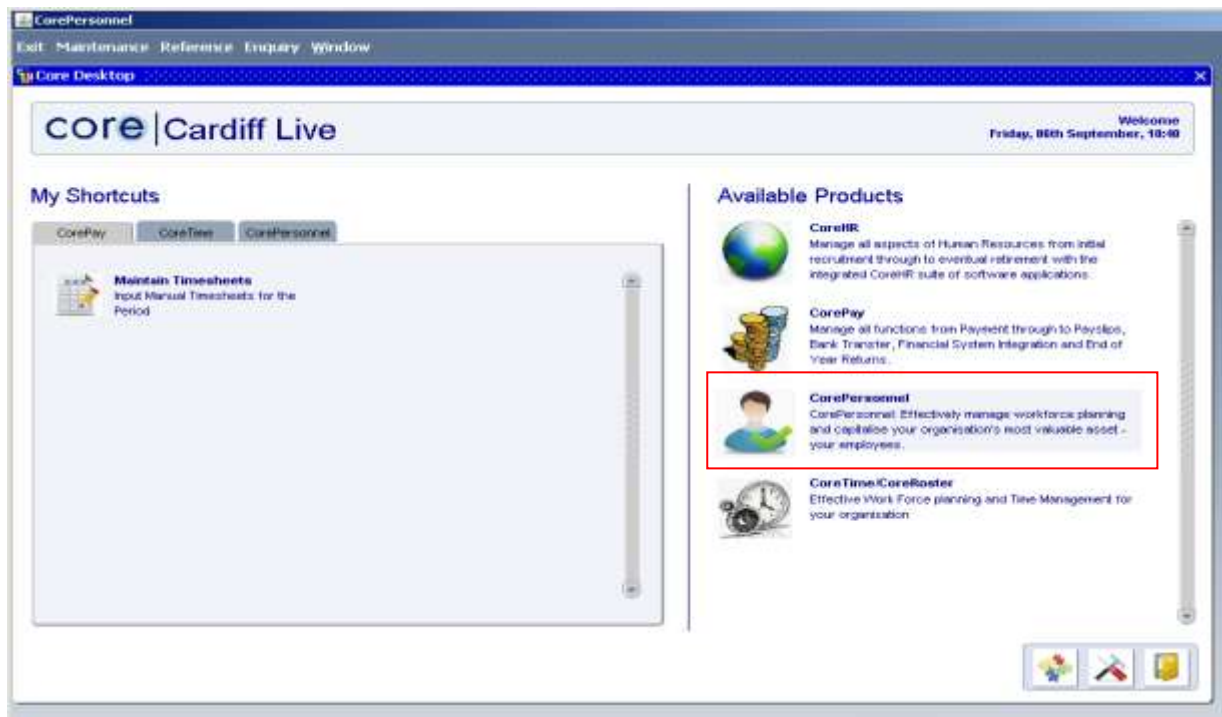
<http://www.cardiff.ac.uk/humrs/staffinfo/informationmanagement/accessbo/index.html>.

On receipt of an approved access form. MISSC will create a user account and notify each new user of the system URL, their username and password and the database information required to log in. Users will be assigned an account based on the type of duties they undertake.

Core is controlled by menu options, which are presented to the user on accessing the system. Access to Core Personnel is restricted to authorised users only, who have been approved access. Each authorised user is assigned a username and password. Passwords are the responsibility of users and should be changed regularly.

## Core Personnel System Overview

CorePersonnel is sub-divided into separate sections for ease of navigation. These menu options within these products are outlined below:



### Exit

This closes the CorePersonnel Main Menu screen and returns the user to the CoreHR Suite Menu screen. Clicking Exit from this screen will close the application entirely.

### Maintenance

This menu allows the user to maintain data in Personnel. It is from this menu that the Personal Details screen is accessed to view employees in the database and to update/amend employee record details. This menu also contains various other maintenance menu options.

### Reference

This contains all the relevant screens for setting up reference data for use throughout the Core Personnel system e.g. Organisation Roles etc.

### Enquiry

The enquiry option allows the user to view relevant information but does not provide the ability to amend any details through these screens.

## **Window**

The selected criteria in this option (Cascade, Tile Horizontally and Tile Vertically) determine how you view windows on your screen.

Other products which will soon be available include:

## **Training**

The training module consists of 3 sub-menus. These include:

1. Training Enquiries
2. Training Maintenance
3. Training Reference

The Training Enquiries Menu gives the user the option to view training details only i.e. no modifications can be made. All new training details and modifications are created in the Training Maintenance menu. Some of the training reference codes e.g. completion reasons, are set-up in Training Reference menu.

## Navigating in Core

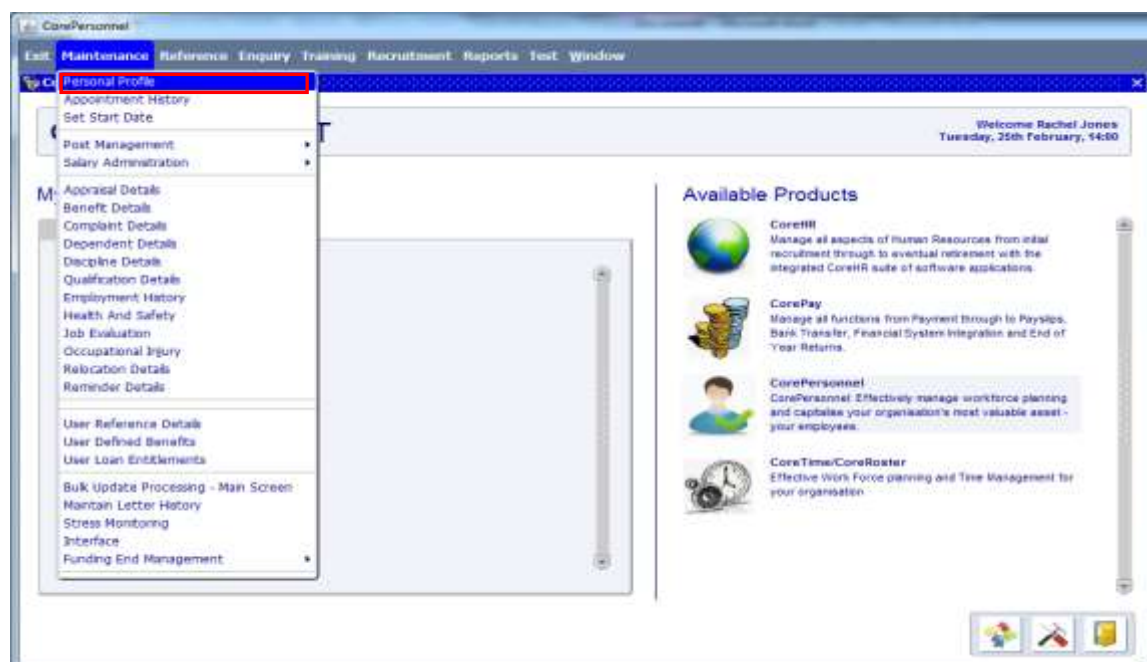
Core uses a combination of mouse and keyboard options to move around within the system. Menus are used to direct functions within the system and standard toolbars are used across the application.

### Using the Mouse

When using the mouse, click on the required menu to display the menu items and select the required menu item.

For example, from the main Personnel menu, select Maintenance, Personal Profile. You are now in the Employee Search screen as illustrated below.









enables you to duplicate the previous record



enables you to clear the values on screen. It does not delete the record



enables you to choose from a valid list of values



enables you to exit a screen

## **Status Bar**

The Status Bar is positioned at the bottom of each screen and displays error messages, valid values and the mode in which the screen is currently occupying.

## Chapter 1- Post Management

### The Basic Principles of Post Management



Core is an integrated HR & Payroll system that works on the basis of position management and uses posts as the foundation for this.

#### **Posts**

Posts can be defined as the roles/vacancies within an organisation. These posts must fit within the organisational structure and will be validated against this structure.

The Post can be referred to as a template for the job.

Remember, posts are NOT the people; these are dealt with separately. Posts have a number of attributes including number, title, hierarchy attributes, pay scale, FTE etc. A post can exist without an employee attached to it but an employee cannot exist if he/she is not attached to a post via an appointment.

#### **Appointments**

Each Post has a planned appointment(s) against it. Every new appointment is linked to a post. The appointment is uniquely identified by a combination of post number and sequence number. An appointment can be tracked from the planning stage through to the leaving stage. Each stage is indicated by a change in appointment status and a corresponding change in effective dates.



Post and appointment relationships can be configured as:

- **One to one relationship between people and posts**

Each post is unique and will only ever have one individual employed in them at any time (i.e. University Vice-Chancellor).

- **Appointment of many employees to the same posts – known as a “bucket” post**

Some posts are more generic and will have multiple employees who carry out the same work. This is known as a ‘bucket’ post (examples of which are Library Assistants, Campus Patrol Officers or Domestic Assistants).

- A combination of the two outlined above

## Employees

Employees are appointed to appointments, **not posts**; the appointment acts as a connector between person and post in Core.

Post and appointment relationships can be configured as:

- **One to one relationship between people and posts**



*Diagram 1.1: one to one relationships*

This situation applies when the post is unique and will only ever have one individual employed in them at any time (i.e. University Vice-Chancellor).

- **Appointment of many employees to the same posts – a “bucket” post**

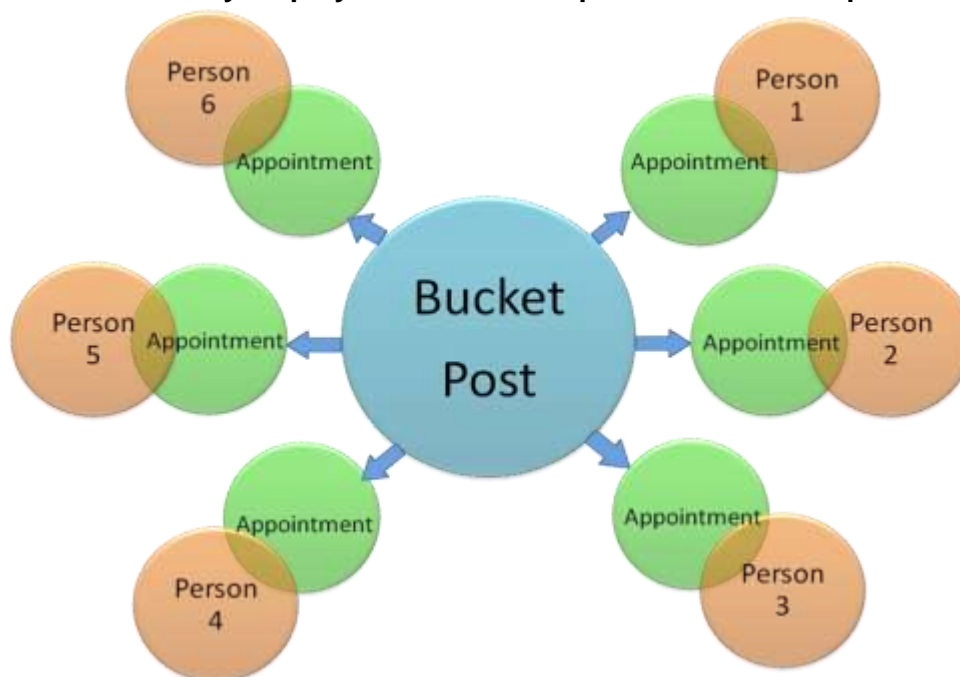


Diagram 1.2: linking posts and people in a bucket post

Some posts are more generic and will have multiple employees who carry out the same work. This is known as a ‘bucket’ post (examples of which are Library Assistants, Campus Patrol Officers or Domestic Assistants).

- **A combination of the two outlined above**

## Employees

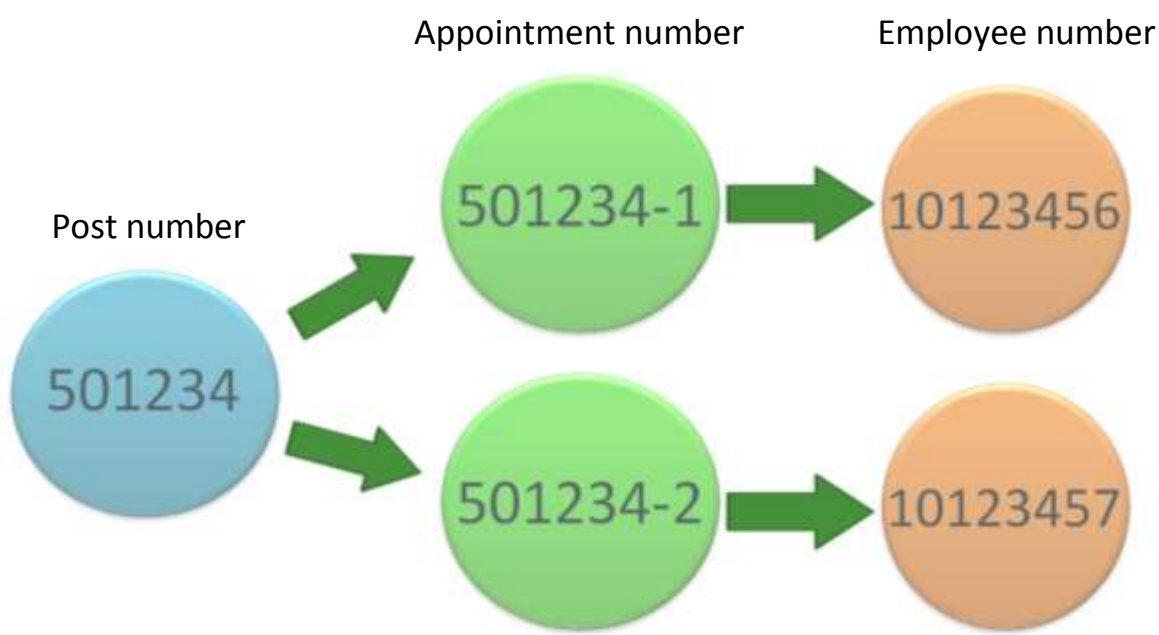


Diagram 1.3: Numerical identifiers of posts, appointments and persons

Each employee has their own unique appointment and their own unique employee number.

This appointment, coupled with an employee's personal details, creates a 'Personal Profile' i.e. a HR record. The status of a post appointment can be:

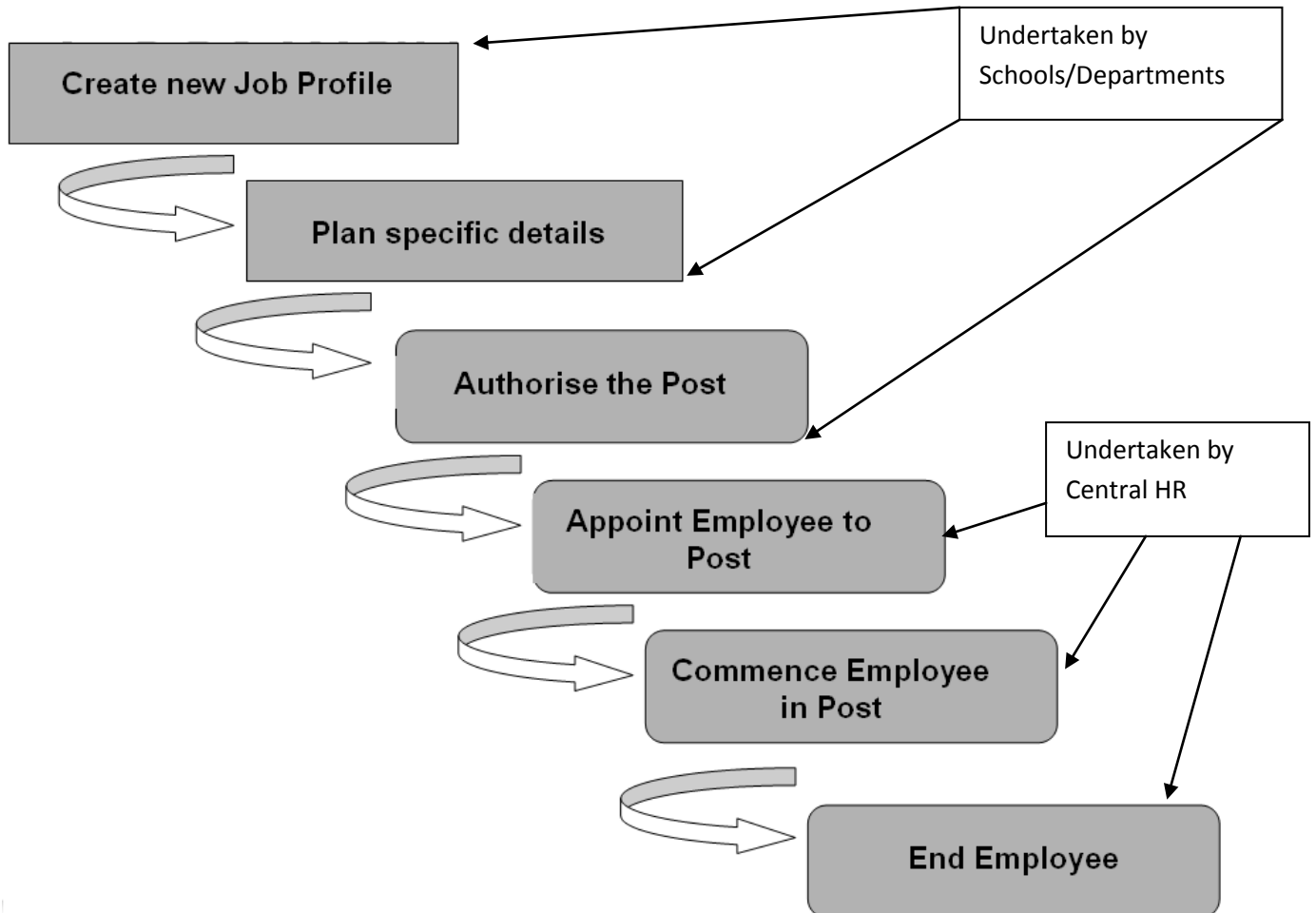
POST STATUS	DETAILS
Planned	Every new appointment has this status. The appointment has no-one in post and is pending authorisation
Authorised	Every appointment must be authorised before a person can be connected to it. Once authorised, the appointment is ready to connect to a person.
Appointed	An appointment linked to a current employee or applicant who is not yet active in post.
Commenced	An appointment that is commenced has an active employee in post.
Confirmed Future	An appointment with an employee connected to it with a confirmed date in the future.
Ended	An ended appointment (e.g. when an employee leaves the organisation)

For each employee to be appointed, the School /Professional Service must plan and authorise a new post, 'Post Appointment', against the relevant post template. This facilitates the recruitment process and when the successful candidate is found, they can be appointed to that version of the post.

When 'bucket posts' exist, the School / Professional Service will need to plan and authorise multiple appointments against that post to facilitate recruitment of individuals against each vacancy. Each planned and authorised appointment will hold details specific to the individual e.g. spine point, relevant factor, start and end dates. More than one employee may occupy the same post simultaneously but they will never occupy the same appointment (see diagram 1.3 above).

## Post Management Process

The general Post Management process consists of 6 steps:



## Managing Posts at Cardiff

When a post becomes available, there are 3 methods of appointing to that position. These are:

### **Option 1: Creating a new post**

This option should **only** be used if a brand new post is required, additional and unique to any existing posts within the current structure.

### **Option 2: Appointing to an existing post**

This option should be used if you are replacing an employee that is leaving.

### **Option 3: Maintaining an FTE**

This option should be used if a similar post exists within a School / Professional Service and the number of the appointments within that post, are changing.

With all 3 options, a terms and conditions profile, pension scheme & cost allocation will need to be assigned, and then the post should be planned and authorised. If this is not carried out, the People Services Team will be unable to locate the post and appoint anyone to it.

The majority of post management is a College / School / Professional Service function. Central HR may undertake some Post management on behalf of College / School / Professional Services, but this is generally limited to Regrading and Academic Promotions only.

### **Should I use a “bucket post”?**

A bucket post will have multiple employees appointed against it. Bucket posts are generic and should only be used where the job description is identical or similar. Bucket posts can be created from an existing post template by maintaining the FTE against it.

Bucket posts will always have the same post hierarchy details such as College, School, Division, Department, category and grade. However the occupants may have different appointment details. For example the bucket post template might be open ended but the appointment details of the employees employed against each sequence of the post may be different, i.e. Employee 1 is fixed term and part time and Employee 2 is open ended and full time.

If you are intending to use bucket posts and are unsure how to proceed please contact PSC at HR for advice. It may help to think of the posts in terms of redundancy. What would happen to the post occupants if a redundancy situation were to occur? If the answer to this is that all of the occupants would be in a pool for redundancy because the need for the role they occupy has ceased or diminished then it will generally be ok to use a bucket post. If the answer is that some would be in the pool but others would be excluded because their roles are different then you might need to think about setting up two bucket posts to cover each post.

Bucket posts should not be used on a wholly generic basis. It's not advisable to create a bucket post on a category or grade basis. For example, try not to create a bucket post for all staff within the same career pathway who might be employed on different grades. Remember that unless the job is the same or broadly similar it may be better to use a one to one relationship.

## **Adding the Post Cost Allocation**

### **Quick GL Checklist**

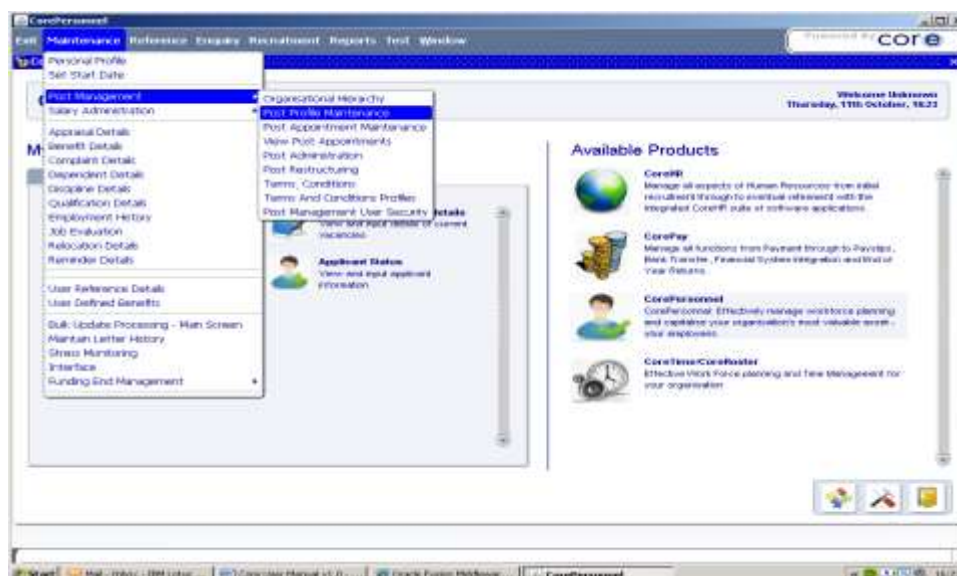
- When creating a post/amending a cost allocation against an appointment which does not have an impact on a relevant factor, ensure that you have entered a valid Cost Centre
- Cost centre should not be **9999 or 1** (Unless they are Student Demonstrators, Honorary etc.)
- Enter Project Code – Ensure the project code matches the cost centre i.e. 11200 & AA11201000 or RCUE058 & **DI**
- Enter the sub category and ensure it matches the employee status and sub status e.g., for a project funded Research Associate who is full time, fixed-term, the sub category will be DI STF Researcher FF, and for a School funded Administrator who is open-ended and part-time, the sub category will just be Admin Support
- Check that the Expense Code has been entered
- Check that the cost allocation screen has been completed, as if this is left blank then GL will look for the funding codes from the appointment screen

## Option 1:- Creating a new post

There will be occasions when you will need to amend your staffing profile by creating a completely new post. This will require you to create a post template using the post profile maintenance menu option available in Core.


- 💡 Make sure you've ruled out the ability to use an existing template before you create a new post. You can search for existing posts within your School by selecting **Core Personnel**→ **Maintenance**→ **Post Management**→ **Post Profile Maintenance** and searching via a key field such as Job Title. If you find one that is broadly similar but needs some hierarchy or other post information changed remember you can use the duplicate function, please refer to pages 87-89 on instructions on how to do this.

- 1- Select **Core Personnel**→ **Maintenance**→ **Post Management**→ **Post Profile Maintenance**



- 2- On the **Post Profile Selection** screen, select **New** to create a new post

The screenshot shows the 'Post Profile Selection' window. On the right side, under 'Advanced Options', there is a 'Status' dropdown menu with 'New' selected, highlighted by a red rectangle. Other options include 'Auto Authorisation', 'Auto Commencement', 'New Auto', and 'All'. Below this is a 'Post Status' section with radio buttons for 'Active', 'Inactive', and 'Both'.

- 3- At the **Post Profile Maintenance** screen, populate the fields listed below (you can use the blue  buttons to select from the available dropdown lists).

The screenshot shows the 'Post Profile Maintenance' window. The 'Post Number' field is highlighted with a red rectangle. The 'Post Title' is 'VICE CHANCELLOR'. The 'Effective Date' is '01-OCT-2012'. The 'Post Status' is 'ACTIVE'. The 'Post Profile Type' is 'OPEN-ENDED'. The 'Manager's Order' is '1'. The 'Structure Code' is 'CARDIFF UNIVERSITY'. The 'Auto Authorisation' and 'Auto Commencement' checkboxes are unchecked. The 'Hierarchy Definition' section shows a tree structure starting from 'CARDIFF UNIVERSITY'. The 'Category' is 'SM', 'Sub Category' is 'SENIOR MANAGEMENT', 'Pay Scale' is 'C1000', and 'FTE' is '10.00'. The 'Hours' are '35.00'. The 'Job Description' and 'Comments' sections are empty. The 'Punding Empty', 'Requisition Number', 'Estimated Annual Cost', 'Analysis Code', 'Report To Post', and 'Substitution Post' fields are also empty.

- **Post Title** – These are pre-set to be generic. Any detail specific to the job title can be added in Job Text at the planning stage
- **Post number**- will automatically populate when you complete and save this screen
- **Effective date** (the date from which the post is created)
- **Post Profile Type**, Open-ended or fixed-term **should be the ONLY** profiles used.
- **Manager's Order**- leave blank
- **Structure Code** – Cardiff University

There is no requirement to complete radio buttons 'Auto Authorisation' and 'Auto Commencement'.




**Core Quirk:** When creating a post, after you've entered the **Structure Code**, tab to the next field to make the hierarchy fields appear below.



Please ensure that the hierarchy details are correct prior to planning your post as changes cannot be made following this stage, and subsequently a new post would need to be created.

- **Company – This will always be Cardiff University**
- **College**
- **School / Directorate**
- **Division**
- **Department**
- **Cost Centre**
- **Workgroup**
- **Location**
- **HESA Cost Centre (if known)**
- **Activity / Staff Class**
- **Objective Justifications** (if the post you created is fixed term) – It is essential that this is populated correctly, as it will serve as the justification for a member of staff being entitled to redundancy, e.g. If working on a project, redundancy would be applicable, if providing cover for a staff member, no redundancy will be applicable.
- **Category**
- **Sub Category**
- **Payscale**
- **FTE** (this is the number of appointments against the same post that might be available)
- **Hours** (the number of contracted hours for the post)

When all fields have been populated, click  to save and make a note of the post number. Continue with assigning the following:

	Page
Terms and Conditions	34-37
Pensions	39-40
Cost Allocations	31-33

## Option 2:- Planning and Authorising against an existing post

Within Core, data will exist for all posts occupied by an employee (or the title holder) that existed in Compel. This means that if an employee leaves and you need to recruit to backfill that position, you will not need to create a new post, you will only have to plan and authorise a new appointment against the post.

💡 If the employee was open-ended with a relevant factor and their previous post migrated with that post profile type, you will need to duplicate the post and change this profile type. Please refer to pages 87-89 for instructions on how to duplicate a post

To appoint to an existing post:


- 1- Select **CorePersonnel** → **Maintenance** → **Post Management** → **Post Profile Maintenance**. Double click on the post when it appears
- 2- Insert the post number or job title of the vacant post (the post that the previous employee was appointed to), and click **Search**

Post No	Post Title	Company	Department	Pay Scale	Effect Date	Post FTE	Active FTE
000015	LECTURER	CARDIFF UNIVERSITY	HUMAN RESOURCE MANAGEMENT	GRADE 7 FT 35-43	01-SEP-2000	1.0000	1.0000
000016	LECTURER	CARDIFF UNIVERSITY	PRIMARY CARE AND PUBLIC HEALTH	GRADE 7 FT 35-43	04-OCT-2011	0.5000	0.0000
000018	LECTURER	CARDIFF UNIVERSITY	MATHS TEACHING	GRADE 7 FT 35-43	01-OCT-2002	1.0000	1.0000

💡 Pay attention to the Post FTE and Active FTE columns on the far right. If the previous employee has left the University, you should see a difference in Post FTE and Active FTE (see line 2 above). Alternatively, if the employee that you are replacing is still in post, you may find the numbers match (see line 1 above).

- If you are employing the replacement employee **whilst the previous employee remains in post** to allow for a handover, you will need to maintain the FTE of the post **before** planning and authorising another appointment, please refer to pages 28-30 for instructions
- If you are employing the replacement employee on a date **after** the employee has left, you will not need to maintain the FTE as the active FTE will reduce the day that the employee leaves

- 3- Double click on the appropriate post and the 'Post Profile Maintenance' screen will populate. Once in the screen, you can amend any necessary details. Please be aware that you will be unable to change the hierarchy fields (e.g. College, School, Division etc.) at this point, but other details such as Location, Work Group, may be edited.

When all required fields are populated, click 

Double check that the post has all appropriate terms and conditions, pension schemes and cost allocations assigned to it before you begin to plan and authorise your appointments. These steps are described in more detail in Chapter 2.

## Option 3:- Maintaining an FTE for an existing post

If you want to appoint an additional person to a post that already exists (i.e. if you are replacing an appointment with a handover period, if increased funding is available for more research staff or if business demand increases resulting in a need for additional administrative support) this option should be used as an alternative to creating posts on a one to one basis:

- 1- Select **Core Personnel**→ **Maintenance**→ **Post Management**→ **Post Profile Maintenance**



- 2- Insert the post number you want to create the additional appointment against and double click on the record to gain access to the Post Profile Maintenance Screen.
- 3- The FTE will be showing as the current number of available appointments against the post. Choose 'Maintain FTE' from the drop down menu on the right hand side

**Post Profile**

Post Title: 20 ADMINISTRATIVE ASSISTANT

Post Number: 200000 Post Status: ACTIVE

Effective Date: 01-AUG-2003

Post Profile Type: FT FIXED TERM

Managers Order: 1

Structure Code: 1 CARDIFF UNIVERSITY

Auto Authorisation: ☐ Auto Commented: ☐

**Hierarchy Definition**

Company: 1 CARDIFF UNIVERSITY

College: 2001 BIOLOGICAL & LIFE SCIENCES

School: 2001 DENTISTRY

Division: 2001 DENTISTRY

Department: 2001 DENTISTRY

Cost Centre: 2001 DENTISTRY

Work Group: 2001 DENTISTRY

Location: 2001 DENTISTRY

HESA Cost Centre: 2001 DENTISTRY

Activity/Shift Class: 2001 DENTISTRY

Org. Authorisation 1: 2001 DENTISTRY

Org. Authorisation 2: 2001 DENTISTRY

**Category**

AS: 2001 ADMINISTRATIVE SUPPORT

Sub-Category: 2001 54151 ADMIN SUPP 44

Pay Scale: GR2 GRADE 2 PT 6-10

FTE: 1.00 Hours: 35.00

**Select Detail**

01 - Job Profile

02 - Plan Appointments

03 - View Appointments

04 - Compliance Profile

05 - Selection History

06 - Status Detail

07 - Make Comment/Revoke

08 - Maintain FTE

09 - Maintain FTE

10 - Maintain FTE

**Job Description**

Comments:

**Funding Entry**

Resolution Number: 200000 Estimated Annual Cost:

Analysis Code:

Report To Post:

Substitution Post:

- 4- A new window will appear. Choose '**Update FTE**', and under '**Effective Date**' enter the date that the new appointments are effective from. Under FTE, type the number of FTE that you are increasing the post **by**. Enter your name in the 'approved by' box and give a brief description in the '**Comments**' field to explain the reason for the increase in FTE. Click **Save**

The screenshot shows the 'Maintain FTE' dialog box in the 'CarePersonnel 16.2.1 - UAT' application. The dialog box is titled 'Maintain FTE' and has a 'Transfer FTE' checkbox and an 'Update FTE' button. The 'Post Number' is 50097, 'Post Title' is ADMINISTRATIVE ASSISTANT, and 'Effective Date' is 01-AUG-2013. The 'FTE' is 3.00. The 'Approved By' field contains 'ANDREA'. The 'Comments' field contains '3 additional Administrative Assistant posts have been become available'. The 'Save' button is highlighted with a red box.

- 5- The following message will be displayed to confirm the update has been made.

The screenshot shows the 'Maintain FTE' dialog box in the 'CarePersonnel 16.2.1 - UAT' application. A confirmation message box is displayed over the dialog box, stating 'FTE Successfully Updated' with an 'OK' button. The 'Save' button in the dialog box is highlighted with a red box.

6- The increase in FTE will now be visible on the Post Profile Maintenance screen.

The screenshot displays the 'Post Profile Maintenance' window. The 'Post Profile' section includes fields for Post Title (ADMINISTRATIVE ASSISTANT), Post Number (000001), Effective Date (01-AUG-2013), Post Profile Type (FIXED TERM), Managers Order, and Structure Code (CARDIFF UNIVERSITY). The 'Hierarchy Definition' section lists various organizational levels from Company to Activity/Start Class. The 'Funding' section at the bottom includes Category (ADMINISTRATIVE SUPPORT), Sub Category (EX STP ADMIN SUPP FF), Pay Scale (GRADE 2 FT 6-10), and FTE (4.00, highlighted with a red box). Other fields include Hours (35.00), Funding Expiry, Requisition Number, Estimated Annual Cost, Analysis Code, Report To Post, and Substitution Post.

As the Post has already been created and you are simply increasing the number of appointments against it, you do not need to assign Terms & Conditions, Pension Schemes or Cost Allocations. If there are differences between the appointments, you can make these changes when planning the appointment.



## Adding the Post Cost Allocation

**Post cost allocations (funding codes) must be recorded against ALL posts.**

The cost allocations screen is particularly important for fixed term posts because the end date of the cost allocation is used to drive the fixed term management process, as well as the redeployment process. For fixed term staff, the end date of the cost allocation **must** be entered as the anticipated end of the fixed term contract. If the cost allocations change between the start and end date of the contract then the end date should also be changed. If a contract is extended, it is critical that the cost allocation end date is also extended, otherwise the fixed term review e-mails and processes will be triggered on the wrong dates.

There are three parts to cost allocations which are: Cost Centre, Project Code & Expense Code. All are entered at the post level (see screenshots below). **To enable you to enter the expense code, the scroll bar at the bottom right of the screen must be used.**

1. From the post profile screen, scroll down the 'Select detail' menu on the right hand side and select the **Post Cost Allocation** option

The screenshot shows the 'Post Profile Maintenance' window in the CorePersonnel 19.0.4 - CFO system. The 'Select Detail' dropdown menu on the right is open, and the option '12 - Post Cost Allocation' is highlighted with a red rectangle. The main form contains various fields for post details, including Post Title, Post Number, Effective Date, Post Profile Type, Managers Order, Structure Code, Auto Authorisation, Auto Commencement, Hierarchy Definition (Company, College, School, Division, Department, Cost Centre, Work Group, Location, HESA Cost Centre, Activity/Start Class, Obj. Attribution 1, Obj. Attribution 2), Category, Sub Category, Pay Scale, FTE, Hours, Job Description, Comments, Funding Entry, Requisition Number, Analysis Code, Report To Post, Substitution Post, and Estimated Annual Cost.

2. Click on '**Add Allocation**'

The screenshot shows the 'CorePersonnel 19.0.4 - CFG' window. The 'Post Profile' tab is active, displaying fields for Post Title (SCHOOL MANAGER), Post Number (104233), Post Status (ACTIVE), Effective Date (31-JAN-2014), and Post Profile Type (OPEN-ENDED). The 'Cost Allocations' tab is also visible, showing a table with columns: Start Date, End Date, %, Cost Centre, Description, Project Code, and Description. The 'Add Allocation' button is highlighted with a red box.

3. In the new screen, start by populating the dates, please note only enter an end date if the post is fixed-term

The screenshot shows the 'Add/Edit Cost Allocation' dialog box. The 'Start Date' field is populated with '31-JAN-2014'. The 'End Date' field is empty. The 'Project Code' field is highlighted with a red box. The dialog also includes a table with columns: %, Cost Centre, Description, Project Code, and Description. The 'Save', 'Cancel', and 'Delete' buttons are visible at the bottom.



4. Use the Scroll Bar to move the screen to the right, and then the expense code may be entered. Click save when finished.

CorePersonnel 18.0.4 - CFG

Exit Maintenance Reference Enquiry Recruitment Reports Test Window

Post Profile Maintenance

Post Profile

Post Title: 1001 SCHOOL MANAGER

Post Number: 104292

Effective Date: 01-JAN-2018

Post Status: ACTIVE

Post Profile Type: OPEN-ENDED

Select Detail

DB - Competency Profile

DB - Selection History

DB - Status Detail

DB - Work Centre/Responsible

Structural

Start Date: End Date: %: Cost Centre: Description: Project Code: Description:

Add/Edit Cost Allocation

Start Date: 01-JAN-2018

End Date:

%	Cost Centre	Description	Expense Code	Description	Delete
100	10000	10000	10111	10111	Delete
					Delete
					Delete
					Delete
					Delete
					Delete
					Delete
					Delete
					Delete
					Delete

Save Cancel Delete

**N.B.** The cost allocation should always add up to 100%. If a post is part-time and split funded from 2 sources, the allocation would be input as 50% from one code and 50% from a second code.

Remember that if the post is fixed-term, the end date should **ALWAYS** be entered as the end date drives the fixed term process notifications!

## Assigning the Terms & Conditions profile to the post

The majority of new posts will require a terms and conditions profile assigned against them. The relevant profile must be selected at the post creation stage. Selection of the profile will depend on the job's category and / or grade, and will determine criteria such as probation requirements and annual leave balances. Careful selection is critical as an incorrect profile will assign the wrong information against the post and affect every employee who is appointed to that post.

- 1- To assign the Terms and Conditions Profile to the Post, select **Terms and Conditions** from the 'select detail' menu on the right hand side of the **Post Profile Maintenance** screen

The screenshot displays the 'Post Profile Maintenance' window in the CoePersonnel 16.2.1 - UAT application. The window is divided into several sections:

- Post Profile:** Fields for Post Title (1104), Post Number (200041), Effective Date (01-SEP-2012), Post Profile Type (OE), Manager's Order, and Structure Code (1). It also includes checkboxes for Auto Authorization and Auto Commencement.
- Hierarchy Definition:** A tree view showing the organizational structure, including Company (1), College (PHYS), School (MATHS), Division (TEAMA), Department (4220), Cost Centre (1), Work Group (NG031), Location (B2), HESA Cost Centre, Activity/Staff Class, Obj. Justification 1, and Obj. Justification 2.
- Select Detail:** A dropdown menu on the right side of the window. The option '15 - Terms And Conditions' is highlighted with a red box.
- Job Description:** A text area for entering the job description.
- Comments:** A text area for entering comments.
- Funding Expiry:** Fields for Funding Expiry, Regulation Number, Estimated Annual Cost, Analysis Code, Report To Post, and Substitution Post.

- 2- The options of the terms and conditions available to you will depend on what category of staff / grade you chose when creating the post. Find the correct Terms and Conditions profile and click the **Select** button. A message will pop up to confirm that the terms and conditions have been assigned to the post

The screenshot shows the 'ConPersonnel 18.2.1 - UAT1' application window. The 'Post Profile' section on the left includes fields for Post Title (1104), Post Number (502941), Effective Date (12-SEP-2013), Post Profile Type (1), and Post Status (ACTIVE). A 'Select Detail' dropdown is set to '00 - Main Contract/Post/Profile'. The 'Select Terms and Conditions for Post 502941' dialog box is open, displaying a table with columns: Template, Title, Reference Type 1, Reference Code 1, Reference Type 2, Reference Code 2, and a 'Select' button. The table contains three rows: '110 Grade 6 Teaching & Research', '111 Grade 7 or 8 T&R staff appoint', and 'CTEST core test'. The 'Select' button is highlighted for the first row. A confirmation message box is overlaid on the dialog, stating 'Terms and Conditions created successfully for post number 502941'. The bottom of the window shows fields for Category (18), Sub Category (1002), Pay Scale (GPR), PTE (1.00), Hours (35.00), Funding Body, Requisition Number, Analysis Code, Report To Post, and Substitution Post.

- 💡 If no Terms and Conditions populate, check that you have selected either Fixed-Term or Open-Ended profile type; for example, a post will never be Open-Ended with Relevant Factor as only a person occupying that post can have that status in a fixed-term post.

- 3- On the **Terms & Conditions** screen that appears, if the **“Allow T’s & C’s to be updated from Template Profile”** is not ticked, then tick it. This is important.

Assigning the relevant T & C’s to the post is important, as it will ensure that the correct Probation Expiry date is applied to the individual’s record within the system, once appointed.

CorePersonnel 16.2.1 - UAT

Action Edit Block Field Record Query Help Tools Window

Terms and Conditions

Post Number: 502941

Template: 110

Reference Type 1: Post Type

Post Type: OPEN-ENDED

Reference Type 2: Category

Category: TEACHING & RESEARCH

Allow T&C's to be updated from Template Profile: ☒

Grade 6 Teaching & Research staff OE appointed on or after 1

Description: Teaching & Research Terms and Conditions for Grade 6 employed on an open ended contract and appointed on or after 1 August 2010

Comments: Teaching & Research Terms and Conditions for Grade 6 employed on an open ended contract and appointed on or after 1 August 2010


Probation Period: 36 Probation Period Type: Months

Employee Notice Period: 3 Employee Notice Period Type: Months

Employer Notice Period: 3 Employer Notice Period Type: Months

Increment Due Months: 12 Increment Hold Ind: ☐

Funding Expiry:

4. If the post is open-ended, then the 'Increment Due Months' box will be empty. If the post being created is fixed-term, then the 12 month option should be visible
5. Click . The **‘Details saved’** pop-up screen will appear

CorePersonnel 16.2.1 - UAT

Action Edit Block Field Record Query Help Tools Window

Terms and Conditions

Post Number: 502941 Allow T&C's to be updated from Template Profile: ☒

Template: 110 Grade 6 Teaching & Research staff OE appointed on or after 1

Reference Type 1: Post Type

Post Type: 25 OPEN-ENDED

Reference Type 2: Category

Category: TR TEACHING & RESEARCH

Description: Payroll Rules Allowance Details Balances

Comments: Teaching & Research Terms and Conditions for Grade 6 employed on an open ended contract and appointed on or after 1 August 2010

Probation Period: 36 Probation Period Type: Months

Employee Notice Period: 3 Employee Notice Period Type: Months

Employer Notice Period: 3 Employer Notice Period Type: Months

Increment Due Months: 12 Increment H&M Int: ☐

Category: TR TEACHING & RESEARCH

Sub Category: 1000 TEACHING & RESEARCH E

Pay Scale: ORS GRADE 6 PT 30-39

FTE: 1.00 Hours: 35.00

Funding Entry:

Requisition Number:  Estimated Annual Cost:

Analysis Code:

Report To Post:

Substitution Post:

Details Saved

6. The next task is to click on the **Balances** tab to assign the leave balance. If the **'Assigned'** box does not have a tick, then tick and click. The **'Details Saved'** message will appear. Use the red door button to exit this screen.

CorePersonnel 16.2.1 - UAT

Action Edit Block Field Record Query Help Tools Window

Terms and Conditions

Post Number: 502941 Allow T&C's to be updated from Template Profile: ☒

Template: 110 Grade 6 Teaching & Research staff OE appointed on or after 1

Reference Type 1: Post Type

Post Type: 25 OPEN-ENDED

Reference Type 2: Category

Category: TR TEACHING & RESEARCH

Description: Payroll Rules Allowance Details Balances

Balance Code: ALD Annual Leave (Days) Days: 30

Balance Segment: 10

Balance Rule: 10

Rule 1 Sub status: F.P. Days: 30

Assigned: ☒

Category: TR TEACHING & RESEARCH

Sub Category: 1000 TEACHING & RESEARCH E

Pay Scale: ORS GRADE 6 PT 30-39

FTE: 1.00 Hours: 35.00

Funding Entry:

Requisition Number:  Estimated Annual Cost:


Analysis Code:

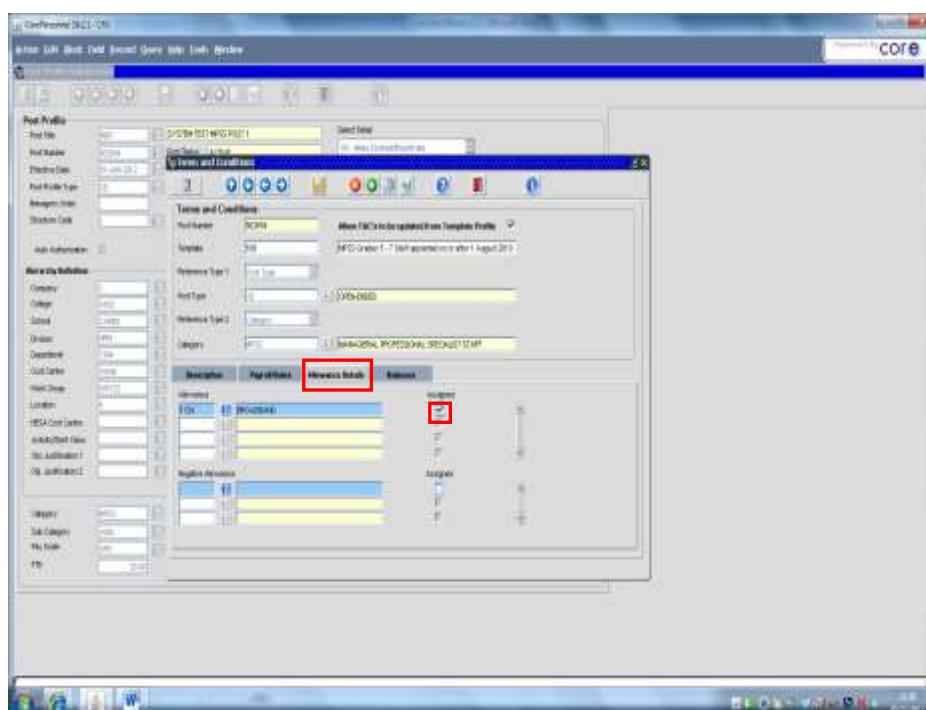
Report To Post:


Substitution Post:

## Assigning allowances against the post

As an optional step and where the conditions of the post determine it to be relevant, you may wish, or need to assign allowances against the post. This can be done by amending the terms and conditions profile you just assigned.

- 1- From the drop down menu on the right hand side select **Terms and Conditions** and click on the **Allowance Details** tab.
- 2- Using the blue , select the relevant **Allowance Code** and then tick the **Assigned** checkbox. You can add as many allowances as may be necessary.



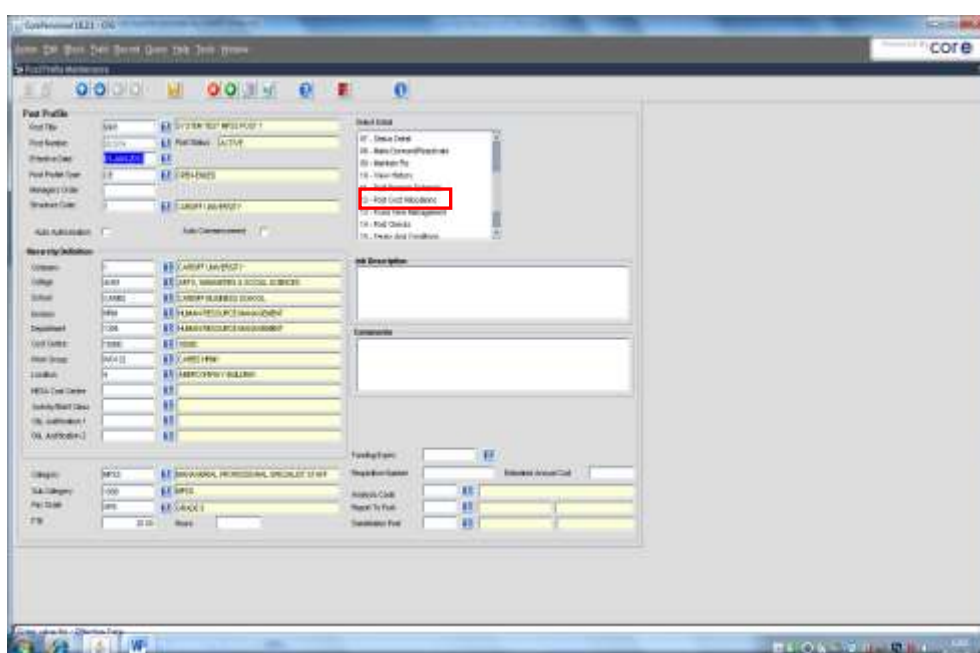
- 3- Click  and after clicking **Ok** at the pop-up message, exit back to the **Post Profile** screen.

**Important Note:** Adding allowances here will not automatically confer them on the employee so you should check each employee's pay profile after they have commenced employment to ensure the accuracy of their pay information.

## Assigning the Post Pension Scheme

When creating a post it is critical to ensure that post pension schemes are populated with the scheme(s) relevant to the post. The table below indicates which entries need to be made in respect of pensions to be applied against the post. If the schemes are not applied prior to commencement of the employee by HR, Salaries will not be able to add this on without intervention from HR staff.

- 1- Using the 'select detail' menu on the right hand side of the screen, select **Post Pension Schemes**.

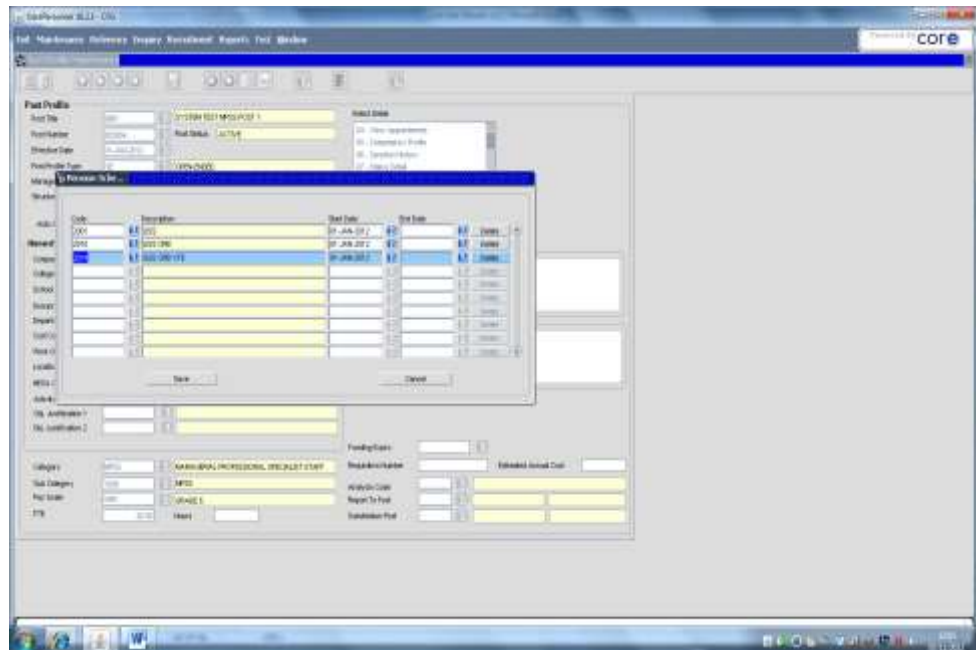


- 2- Click into the white area under **Code** and select **all** the required pension schemes (as detailed in the chart below)

For Grade 1-4 posts:	Select <b>all</b> following options:
CODE	DESCRIPTION (auto populates)
1001	CUPF
1006	CUPF CARE
1009	CUPF 2 CARE
5001	POS PENS CUPF ERS
5004	POS PENS CUPF CARE ERS
5006	POS PENS CUPF 2 ERS
9999	CUPF ER'S SURCHARGE
For Grade 5+ posts:	Select <b>all</b> following options:
CODE	DESCRIPTION (auto populates)
2001	USS
2010	USS CRB
2014	USS CRB VTE
5002	POS PENS USS ERS
5003	POS PENS USS CRB ERS



- 3- Specify the start date of the pension scheme in the **Start Date** field –but do **NOT** specify an end date.



- 4- Click **Save** then **Cancel** to return to the **Post Details** screen. Continue with assigning Post checks if applicable. The post has now been created, you can proceed to plan and authorise the post at this stage, see pages 56-60. If planning and authorising is not required at this time, exit using the Red Door button.



## Post checks / User Defined Fields

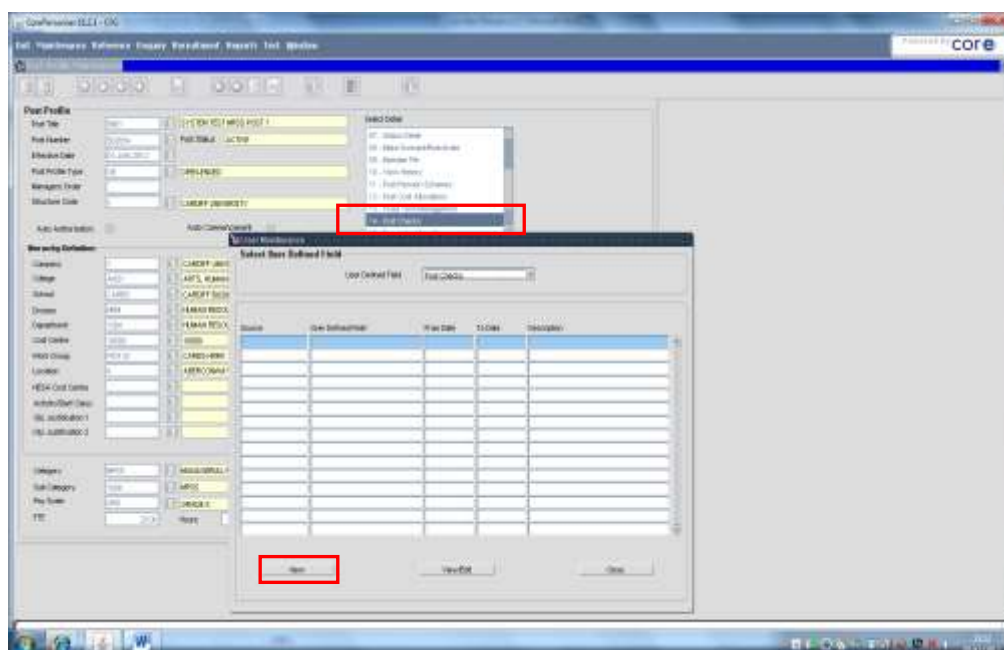
A User Defined Field (UDF) is used to hold additional data about an employee or the requirements of the post. They are used for various purposes including fixed term management, DBS details, preferred language choice etc. and can be accessed from the Person Profile or Post Appointment Maintenance screens.

When creating or updating a post, the only UDF that should be populated is the **Post Checks** UDF. On the **Post Checks** UDF you will define the additional checks that are a requirement of the post.

At the appointment stage, you can then use different UDF's to record information that is specific to the employee occupying the appointment. So in simple terms, the Post Checks UDF is used to flag the type of checks needed. This UDF will be visible at appointment stage to inform HR of the checks they need to carry out before commencing the employee.

**Example:** If a post was created for a Nursery Nurse, everyone appointed to that post would need a DBS check, so you would populate the Post Checks UDF at the Post level to record this as a requirement of the post. When the Nursery Nurse is appointed, and the DBS check has been requested, the HR team will populate the relevant UDF against the employee's record with the details specific to their DBS check (type of check, expiry date etc.).

- 1- Using the dropdown menu on the right hand side of the **Post Profile** screen select the **Post Checks** option. Click **New** to add a record and input the checks that are relevant to the post. When you have finished, click **OK** and **Close**.



There may also be additional checks required for an individual. At appointment stage, if the post requires that the post holder is subject to additional checks, this will need to be recorded in the ***Post Profile*** screen. This will be explored further in Chapter 3.

## Creating an unpaid post

There are a number of post types that are unpaid but still need to be created within the system e.g. Honorary staff, Tier 5 Sponsored Researchers and External Incoming Secondments. They must be allocated to the pay group that has been set up for this category of staff; **Unpaid Title Holders** (code 54).

**Prior to creating a new unpaid post specific to your area, search using the Job Title option to see whether a generic (bucket) post is available for use.** If one already exists, you can use this template profile to plan an appointment making it specific to your own College / School / Directorate. Select the bucket post relevant to your role, select plan appointment (do not amend the template before you click plan appointment as you will overwrite the bucket post). You may now enter the hierarchy relevant to your School or Department.

Bucket posts have been created in the system for Honorary posts and the post numbers for these are as follows:

Post Title	Post Number
Honorary Clinical Teacher	000021
Honorary Distinguished Professor	000022
Honorary Lecturer	000023
Honorary Professor	000024
Honorary Research Associate	000025
Honorary Research Fellow	000026
Honorary Senior Lecturer	000027
Honorary Senior Research Fellow	000028
Honorary Senior Tutor	000029
Honorary Site Librarian	000030
Honorary Tutor	000031
Honorary University Associate	000032
Honorary Visiting Professor	000033
Honorary Associate Clinical Teacher	000036
Sponsored Researcher	504029

**Please Note.** If you are required to create a post for an external incoming secondment, please refer to pages 48-49 of this manual for guidance.


**There is no requirement to complete radio buttons ‘Auto Authorisation’ and ‘Auto Commencement’.**

- 1- Log into Core using your username and password. Select **Core Personnel** → **Post Management** → **Post Profile Maintenance**
- 2- You are creating a new post so select **New**.
- 3- Complete the following fields:

- **Post Title**
- **Effective date** (the date from which the post is created)
- **Post Profile Type** (Unpaid)
- **Structure Code** (1)

**Core Quirk:** When creating a post, after you've entered the Structure Code tab to the next field to make the hierarchy fields appear.

- **Company** (Cardiff University)
- **Category**
- **Sub Category**
- **Payscale** (Not remunerated)
- **FTE** (use 999 - this is the number of the same post that might be available)
- **Hours** (the number hours for this post is zero)

- 5- Press . Make a note of the Post Number.
- 6- The previous step will have created the post as a generic “bucket” position but it will subsequently need to be planned in order to make it post specific. The standard planning and authorising of the post procedure will apply.

## Creating a Post for an Internal Secondment

An internal secondment is when a current member of staff moves to another post within the University for a limited period of time, which is normally no longer than 12 months. If you need to create a new post to appoint a member of staff to a secondment role, the post profile type will always be **fixed-term**.

1. Select **Core Personnel**→ **Maintenance**→ **Post Management**→ **Post Profile Maintenance**
2. On the **Post Profile Selection** screen, select **New** to create a new post
3. Complete the following fields:
  - **Post Title** – *These are pre-set to be generic. Any detail specific to the job title can be added in Job Text at the planning stage*
  - **Post number**- *will automatically populate when you complete and save this screen*
  - **Effective date** *(the date from which the post is created)*
  - **Post Profile Type**, Fixed-term
  - **Manager's Order**- *leave blank*
  - **Structure Code** *(Cardiff University)*


There is no requirement to complete radio buttons 'Auto Authorisation' and 'Auto Commencement'.

**Core Quirk:** When creating a post, after you've entered the **Structure Code**, tab to the next field to make the hierarchy fields appear below.

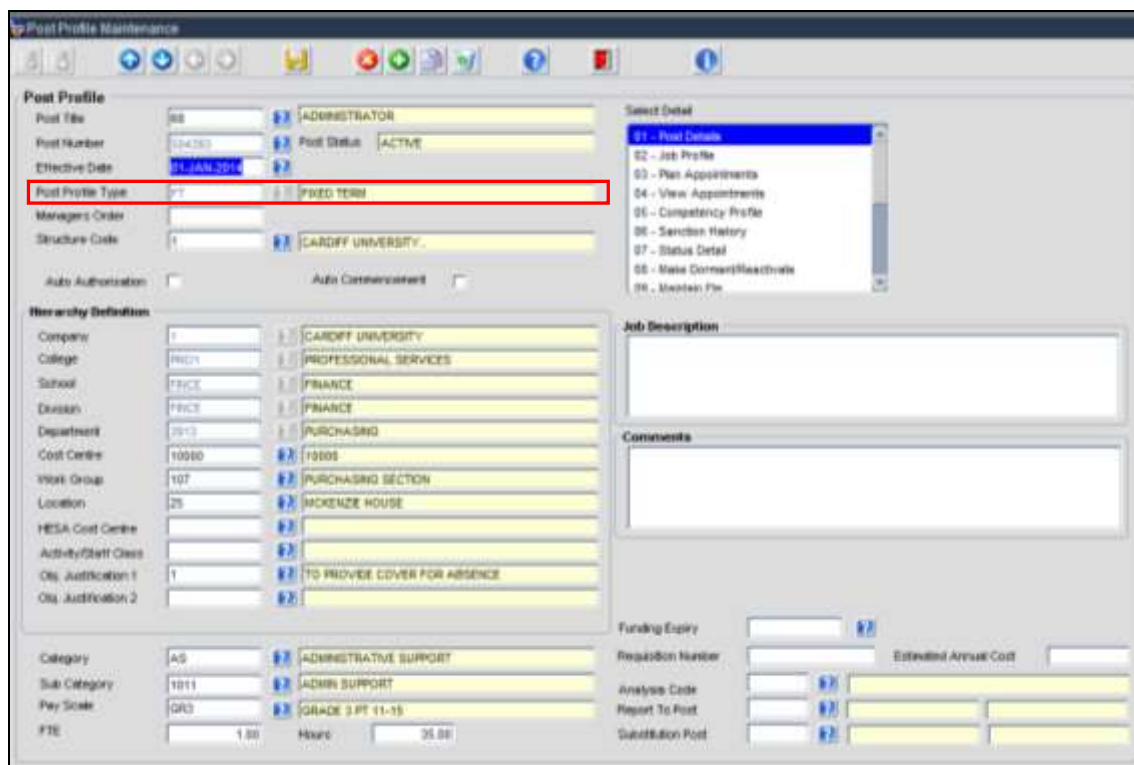


Please ensure that the hierarchy details are correct prior to planning your post as changes cannot be made following this stage, and subsequently a new post will need to be created.

- **Company** – *This will always be Cardiff University*
- **College**
- **School / Directorate**
- **Division**
- **Department**
- **Cost Centre**
- **Workgroup**
- **Location**
- **HESA Cost Centre** *(if known)*
- **Activity / Staff Class**
- **Objective Justifications** *It is essential that this is populated correctly, as it will serve as the justification for a member of staff being entitled to redundancy, e.g. If working on a project, redundancy would be applicable, if providing cover for a staff member, no redundancy will be applicable.*
- **Category**
- **Sub Category**
- **Payscale**
- **FTE** *(this is the number of appointments against the same post that might be available)*
- **Hours** *(the number of contracted hours for the post)*

When all fields have been populated, click  to save and **make a note of the post number**. Continue with assigning the following:

	Page
Terms and Conditions	34-37
Pensions	39-40
Cost Allocations	31-33




Once the above has been completed the appointment can now be planned and authorised, please refer to pages 56-60 for instructions. If however, an individual is covering for a member of staff under the circumstances below;

- Maternity leave
- Long term sick
- Backfilling for another member of staff on secondment.

You will not need to create, plan and authorise a new post. You are able to maintain the **FTE** against the post which the secondee is covering, (please refer to pages 28-30 for instructions on how to do this). PSC will then appoint the individual against that post and relevant sequence number as indicated on the appointment form. If the substantive post holder is open-ended, then the profile type on this post will be open-ended and not fixed-term, however against the individuals' appointment it will state secondment as indicated in the screen shot below.

This is what you will see once PSC have appointed the individual to the seconded post

View Appointment Details: Paul Daniels

<b>Post Details</b> Post No./Sequence: 004100 ADMINISTRATIVE ASSISTANT Post Profile Type: OE Open-Ended Post Effective Date: 11 FEB 2014 Target End Date: Planned End Date: Status: Appointed		<b>Post Details</b>  Post Details: This screen will allow the user to view post profile information. Details cannot be updated directly on this screen.	
<b>Hierarchy Details</b> Company: 1 CARDIFF UNIVERSITY College: B01 BIOMEDICAL & LIFE SCIENCES School: B03 BIOSCIENCES Division: 0100 BIOSI SUPPORT Department: 1100 BIOSI ADMINISTRATION Cost Centre: 1100 1100 Work Group: W0000 BIOSI Admin Support LB Location: 15 DR MARTIN EVANS BUILDING HESA Cost Centre: Activity/Staff Class: Obj. Justification 1: Obj. Justification 2:		<b>Appointment Details</b> Post Type: 00 SECONDMENT Project: AA1100101 AA1100101 Job Category: Job Title: 20 Job Title: ADMINISTRATIVE ASSISTANT Employee Status: 00 SECONDMENT Sub Status: P FULL TIME Category: AS ADMINISTRATIVE SUPPORT Sub Category: 1011 ADMIN SUPPORT Hours: 35.00 Weeks: FTE: 1.00 FTE Hours: FTE Weeks: 52.1400 FTE%: 100 Future Override FTE: Absence Mgt FTE: Pensionable: <input checked="" type="checkbox"/> Acting Up Ind: <input type="checkbox"/> Secondment: <input type="checkbox"/> Action: Reason Code: 00 SECONDMENT Replaces Employee: Comments:	

OK

## Creating a Post for an External Incoming Secondment

External Incoming Secondments are not funded by the University, however there will need to be a post for this person to then be appointed to. We will therefore need to set up an **unpaid** post.

Prior to creating a new unpaid post specific to your area, search using the Job Title option to see whether a generic post is available for use. If one already exists, you can use this template profile to plan an appointment making it specific to your own College/School/Directorate.

- 1- Select **Core Personnel** → **Post Management** → **Post Profile Maintenance**
- 2- You are creating a new post so select **New**.
- 3- Complete the following fields;
  - **Post Title**
  - **Post number**- *will automatically populate when you complete and save this screen*
  - **Effective date** *(the date from which the post is created)*
  - **Post Profile Type** *(Unpaid)*
  - **Manager's Order**- *leave blank*
  - **Structure Code** *(Cardiff University)*

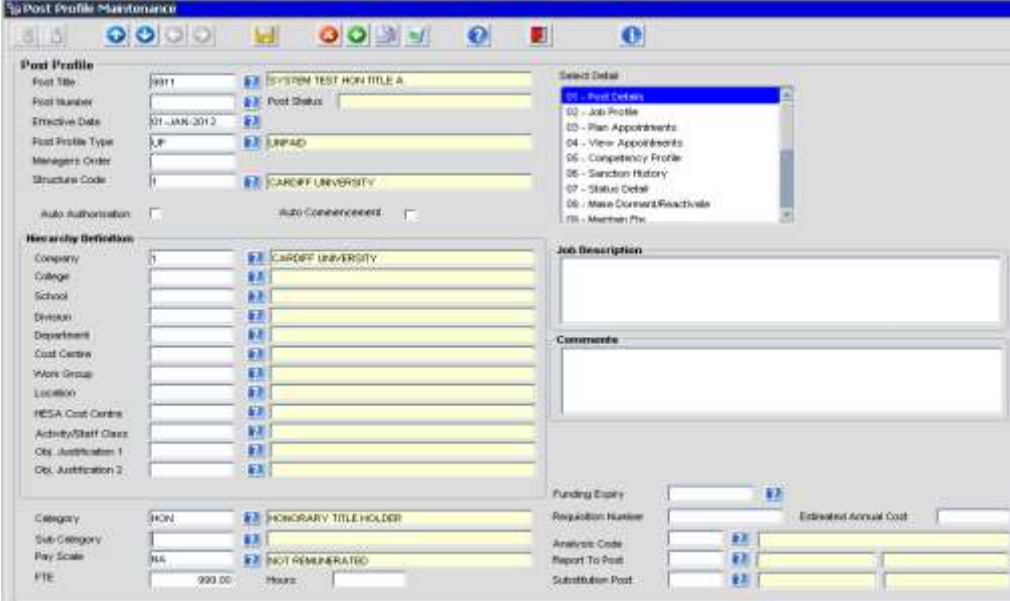
**Core Quirk:** When creating a post, after you've entered the **Structure Code**, tab to the next field to make the hierarchy fields appear below.

- **Company**
- **College**
- **School/Directorate**
- **Division**
- **Department**
- **Cost Centre**
- **Workgroup**
- **Location**
- **HESA Cost Centre** *(if known)*
- **Activity/Staff Class**
- **Objective Justifications** *(if the post you created is fixed term)*
- **Category**
- **Sub Category**
- **Payscale (NON REMUNERATED)**
- **FTE** *(this is the number of vacancies against the same post that might be available)*
- **Hours** *(the number of contracted hours for the post)*

There is no requirement to complete radio buttons 'Auto Authorisation' and 'Auto Commencement'.



- 4- When all fields have been filled in, click  to save and make a note of the post number.



**Post Profile**

Post Title: 9911 SYSTEM TEST HON TITLE A

Post Number: [Field]

Effective Date: 01-JAN-2012

Post Profile Type: UP

Managers Order: [Field]

Structure Code: CARDIFF UNIVERSITY

Auto Authorisation: ☐ Auto Commencement: ☐

**Hierarchy Definition**

Company: CARDIFF UNIVERSITY

College: [Field]

School: [Field]

Division: [Field]

Department: [Field]

Cost Centre: [Field]

Work Group: [Field]

Location: [Field]

HESA Cost Centre: [Field]

Activity/Staff Class: [Field]

Obj. Justification 1: [Field]

Obj. Justification 2: [Field]

**Select Detail**

01 - Post Details

02 - Job Profile

03 - Plan Appointments

04 - View Appointments

05 - Competency Profile

06 - Sanction History

07 - Status Detail

08 - Main Contract/Reactive

09 - Main Plan

**Job Description**

**Comments**

**Funding Entry**: [Field]

**Regulation Number**: [Field] **Estimated Annual Cost**: [Field]

**Analysis Code**: [Field]

**Report To Post**: [Field]

**Substitution Post**: [Field]

**Category**: HON **HONORARY TITLE HOLDER**

**Sub-Category**: [Field]

**Pay Scale**: NA **NOT REMUNERATED**

**FTE**: 999.00 **Hours**: [Field]

- 5- The previous step will have created the post as a generic “bucket” position but it will subsequently need to be planned in order to make it post specific. The standard planning and authorising of the post procedure will apply and instructions on how to do this can be found on pages 56-60

## Creating a Post for an Internal Outgoing Secondment

This type of secondment is where a current member of University Staff is seconded out to an external organisation, e.g. the Welsh Government. The post should be created, planned and authorised by employees' substantive School / Department.

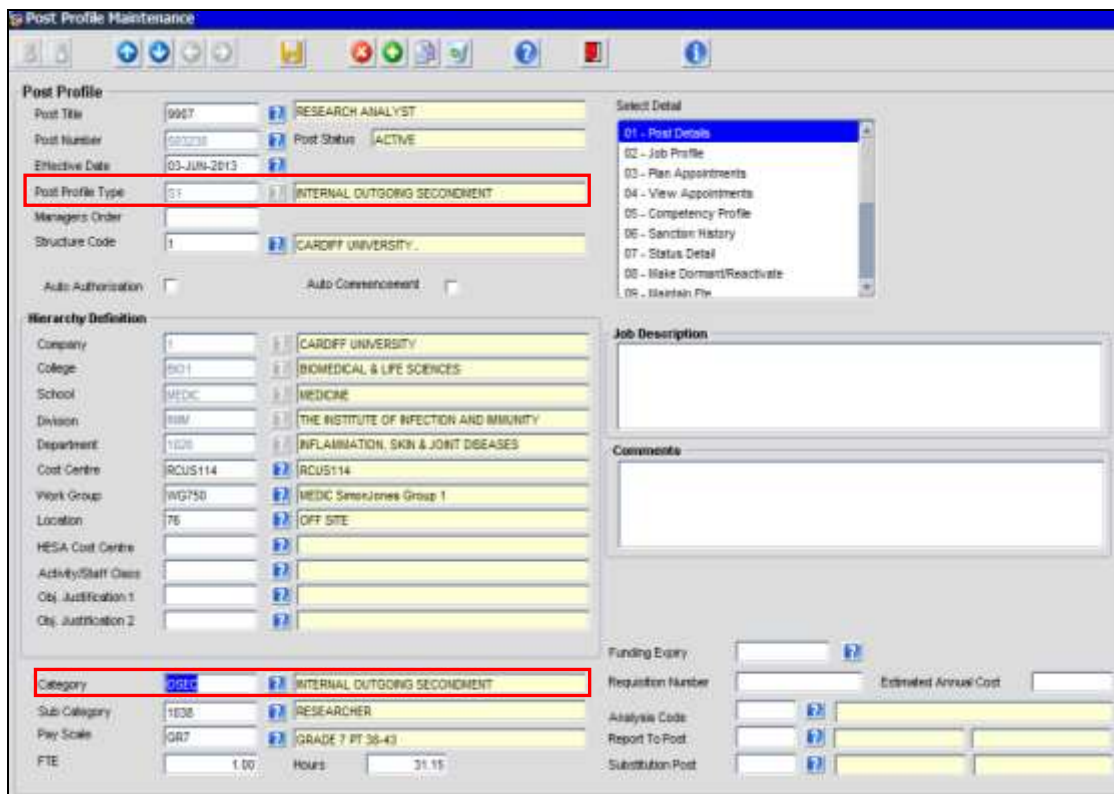
1. Select **Core Personnel** → **Post Management** → **Post Profile Maintenance**
2. You are creating a new post so select **New**.
3. Complete the following fields;
  - **Post Title**
  - **Post number**- *will automatically populate when you complete and save this screen*
  - **Effective date** *(the date from which the post is created)*
  - **Post Profile Type** *Internal Outgoing Secondment*
  - **Manager's Order**- *leave blank*
  - **Structure Code** *(Cardiff University)*

**Core Quirk:** When creating a post, after you've entered the **Structure Code**, tab to the next field to make the hierarchy fields appear below.

- **Company**
- **College**
- **School/Directorate**
- **Division**
- **Department**
- **Cost Centre**
- **Workgroup**
- **Location**
- **HESA Cost Centre** *(if known)*
- **Activity/Staff Class**
- **Objective Justifications** *(if the post you created is fixed term)*
- **Category** *Internal Outgoing Secondment*
- **Sub Category** *This will relate to the grade of the individuals substantive appointment*
- **Payscale** *This will be the grade of the individuals substantive appointment*
- **FTE** *(this is the number of vacancies against the same post that might be available)*
- **Hours** *(the number of contracted hours for the post)*

There is no requirement to complete radio buttons 'Auto Authorisation' and 'Auto Commencement'.

4. When all fields have been filled in, click  to save and make a note of the post number.



5. Continue with assigning pensions and cost allocations. Please refer to the following pages

	Page
Pensions	39-40
Cost allocations	31-33

Once the above has been completed the appointment can now be planned and authorised, please refer to pages 56-60 for instructions.

## Creating a Post for a CAIRD Pre-Sessional Tutor

Please follow the instructions below on how to create a CAIRD Pre-Sessional Tutor

1. Select **Core Personnel**→ **Maintenance**→ **Post Management**→ **Post Profile Maintenance**
2. On the **Post Profile Selection** screen, select **New** to create a new post
3. Complete the following fields:
  - **Post Title** – Teacher
  - **Post number**- will automatically populate when you complete and save this screen
  - **Effective date** (the date from which the post is created)
  - **Post Profile Type**, Fixed-term
  - **Manager's Order**- leave blank
  - **Structure Code** (Cardiff University)


There is no requirement to complete radio buttons 'Auto Authorisation' and 'Auto Commencement'.

**Core Quirk:** When creating a post, after you've entered the **Structure Code**, tab to the next field to make the hierarchy fields appear below.



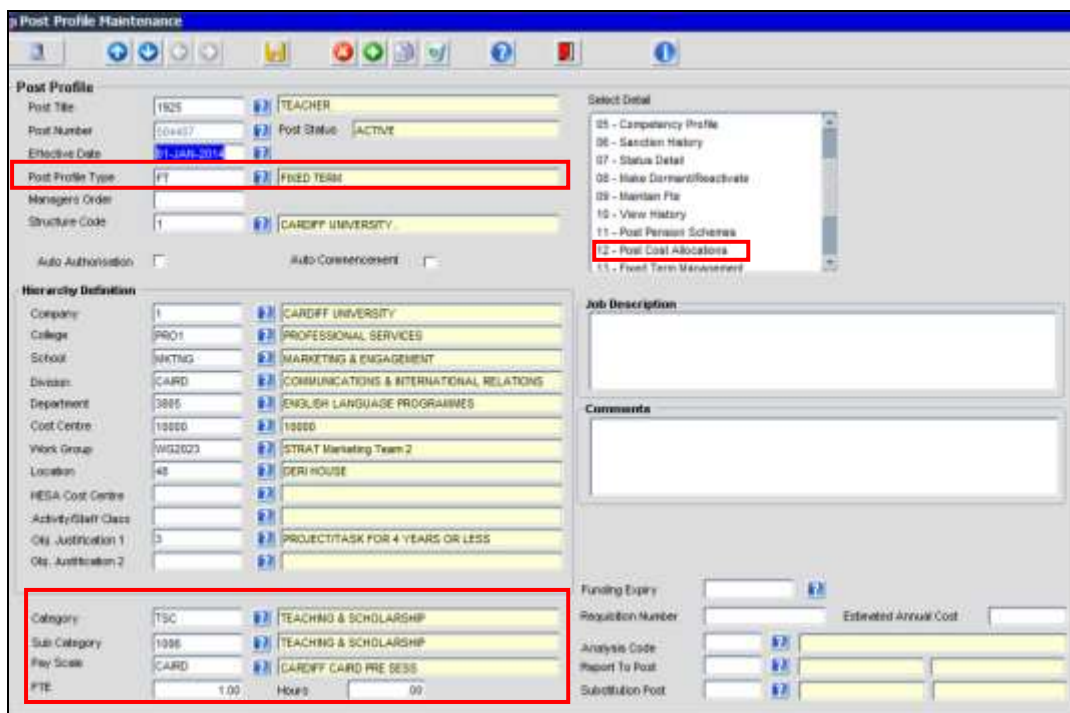
Please ensure that the hierarchy details are correct prior to planning your post as changes cannot be made following this stage, and subsequently a new post will need to be created.

- **Company** – This will always be Cardiff University
- **College**
- **School / Directorate**
- **Division**
- **Department**
- **Cost Centre**
- **Workgroup**
- **Location**
- **HESA Cost Centre** (if known)
- **Activity / Staff Class**
- **Objective Justifications** It is essential that this is populated correctly, therefore please choose the relevant option for your post, as it will serve as the justification for a member of staff being entitled to redundancy, e.g. If working on a project, redundancy would be applicable, if providing cover for a staff member, no redundancy will be applicable.
- **Category** – Teaching and Scholarship
- **Sub Category** – Teaching and Scholarship
- **Payscale** – Cardiff CAIRD Pre Sess
- **FTE** (this is the number of appointments against the same post that might be available)
- **Hours** - Zero

When all fields have been populated, click  to save and **make a note of the post number**. Continue with assigning the following:

	Page
Cost Allocations	31-33

**Please note: You are not required to allocate Terms and Conditions or Pensions when creating the post**



You can now proceed with planning and authorising the appointment, please refer to 56-60 for instructions on how to do this.

**Please note the following when planning the appointment (example of screenshot is below)**

- Planned Pay Scale should be CAIRD Pre Sess
- Planned Point is 1
- The Job Text box should indicate the specific job title as CAIRD Pre-Sessional Tutor

**Post Appointment Maintenance**

**Post Appointment**

Post Number/Seq: 504407 1 1925 TEACHER

Post Profile Type: FT FIXED TERM Status: APPOINTED

Company: 1 CARDIFF UNIVERSITY

College: PRO1 PROFESSIONAL SERVICES

School: MACTHO MARKETING & ENGAGEMENT

Division: CARD COMMUNICATIONS & INTERNATIONAL RELATIONS

Department: 3885 ENGLISH LANGUAGE PROGRAMMES

Cost Centre: 19608 19608

Work Group: W02523 STRAT Marketing Team 2

Location: 48 DERI HOUSE

HESA Cost Centre:

Activity/Staff Class:

Obj. Justification 1: 3 PROJECT/TASK FOR 4 YEARS OR LESS

Obj. Justification 2:

Date: 01-JAN-2014

Pension %:

FTE: 0.00

FTE%:

Project: AA11000101 AA11000101

Job Text: CARD Pre-Seasonal Tutor

**Planned Appointment**

Planned Start Date: 01-JAN-2014

Planned End Date: 31-DEC-2014

Planned Post Type: FT FIXED TERM

Planned Pay Details Not Required:

Planned Rate Type: Scale Point

Planned Pay Scale: CARD CARDIFF CARD PRE SESS

Planned Rate: 1 Rate: Annual

Planned Salary: 116.00 Planned Multiplier: 1.000000

Planned Replaces Employee:

Reason For Planning Post: You are employed to work as a Pre-seasonal Tutor which is departmentally funded and is currently agreed until 31 December 2014.

**Selection**

- 1 - Planned Appointment
- 2 - Actual Appointment
- 3 - Continuance Appointment
- 4 - User Data
- 5 - Comments
- 6 - Status Detail
- 7 - View Employee Appointments
- 8 - View Position History
- 9 - Pension

## Chapter 2 - Planning & Authorising an appointment

After creating a new post, or finding an existing post template, the next steps are to plan and authorise an appointment.

**‘Planning’** is defining specific details relating to a person’s appointment and will contain information such as start/end dates, spine point and relevant factors. Planning an appointment should be done in advance of the person being appointed using the earliest possible start date for anyone starting in the post.

**‘Authorising’** the post is making it available to appoint an employee against so the recruitment process can begin.

When recruiting for a post that will have multiple appointments against it, each appointment will have to be **planned** and **authorised**.

*For example, if you were recruiting 10 Clerical Assistants, you would only need to create or use one post with 10 in the FTE field. You would still need to complete the planning and authorising stage each time you appoint someone.*

Planning /Authorising an appointment will complete the initial post management steps required within Core and enable you to complete the recruitment process prior to appointing a successful candidate. Recruitment will continue to be undertaken within the current eRecruitment system.

If you have not completed the post management steps outlined in Chapters 1 and 2, the People Services Centre will **not** be able to appoint the person.

## Planning the appointment

A post can be planned and authorised at the same time as the post is created, but this is not always the case- it can also be done at a later date. To plan and authorise a post;

- 1- Select **Core Personnel**→ **Post Management**→**Post Profile Maintenance**
- 2- Enter the post number (this was generated when the post was created) into the relevant field, then click **Search** and double click on highlighted post to open the record. Note that the post is showing as being 1 FTE, but is not yet active.

The screenshot displays the 'Core Personnel 16.2.1 - DAT' application window. The title bar includes the application name and a standard Windows menu bar (Action, Edit, View, Field, Record, Query, Help, Tools, Window). Below the menu bar is a toolbar with various icons for navigation and actions. The main window is titled 'Post Profile Selection' and is divided into several sections.

**Selection Criteria:** This section contains a grid of input fields for filtering search results. The fields are organized into two columns. The left column includes 'Structure', 'Company', 'Department', 'Post Title', 'Post Type', 'Post Number', 'Category', 'Pay Scale', and 'Effective Date From'. The right column includes 'Post Number', 'Category', 'Pay Scale', and 'Effective Date To'. Each field has a dropdown arrow and a small 'X' icon. The 'Post Number' field is populated with '902940' and the 'Effective Date From' field is populated with '01-SEP-2013'.

**Auto Indicator:** This section contains a group box with four checkboxes: 'Auto Authorized', 'Auto Concessional', 'Non Auto', and 'All'. The 'All' checkbox is selected.

**Post Status:** This section contains a group box with three radio buttons: 'Active', 'Dormant', and 'Both'. The 'Both' radio button is selected.

**Advanced Options:** This section contains a 'Search' button and a 'Clear' button.

**Post Profiles:** This section contains a table with the following columns: 'Post No.', 'Post Title', 'Company', 'Department', 'Pay Scale', 'Effect. Date', 'Post FTE', and 'Active FTE'. The first row of the table is highlighted in blue and contains the following data: '902940', 'LECTURER', 'CARDIFF UNIVERSITY', 'MATHS TEACHING', 'GRADE 6 PT 30-36', '01-SEP-2013', '1.0000', and '0.0000'. The 'Post FTE' and 'Active FTE' values are circled in red.

- 3- Check that the details against the post template are still relevant. If you need to amend any details (e.g. Post Cost Allocation / Post Pension Scheme / Terms and Conditions Profile etc.), select the relevant option from the **Select Detail** dropdown list on the right hand side of the screen and edit the screen to reflect the new detail.

**Please Note.** If you do make changes to the Post, be aware that these changes will apply to every appointment made against it. If there are multiple appointments to be made against a post (making it a bucket post) and each appointment is different, you can create the different versions of each appointment at the planning stage instead. Ensure that you have made any necessary changes to the post template prior to the planning stage, as they cannot be changed once this has been completed e.g. Post Profile type or Hierarchy.



- 4- Select **Plan Appointments** from the dropdown list on the right hand side of the screen.

- 5- Populate the fields listed below with information specific to the appointment

- Planned Start Date**
- Planned End Date** (relevant only if the post is fixed term)
- Planned Point**
- Planned Replaces Employee** (if known or will be automatically populated if the post has been occupied previously)
- Reason for Planning Post** (for fixed term staff or open ended staff with relevant factors this should include details of the relevant factor applicable to the post, as well as any other details you may want to enter) **Note:** When entering a relevant factor, please do not use any special characters as this may cause issues during mail merge from Core.

**Please Note.** If you are planning a post with a fixed salary, you will need to select the following options;

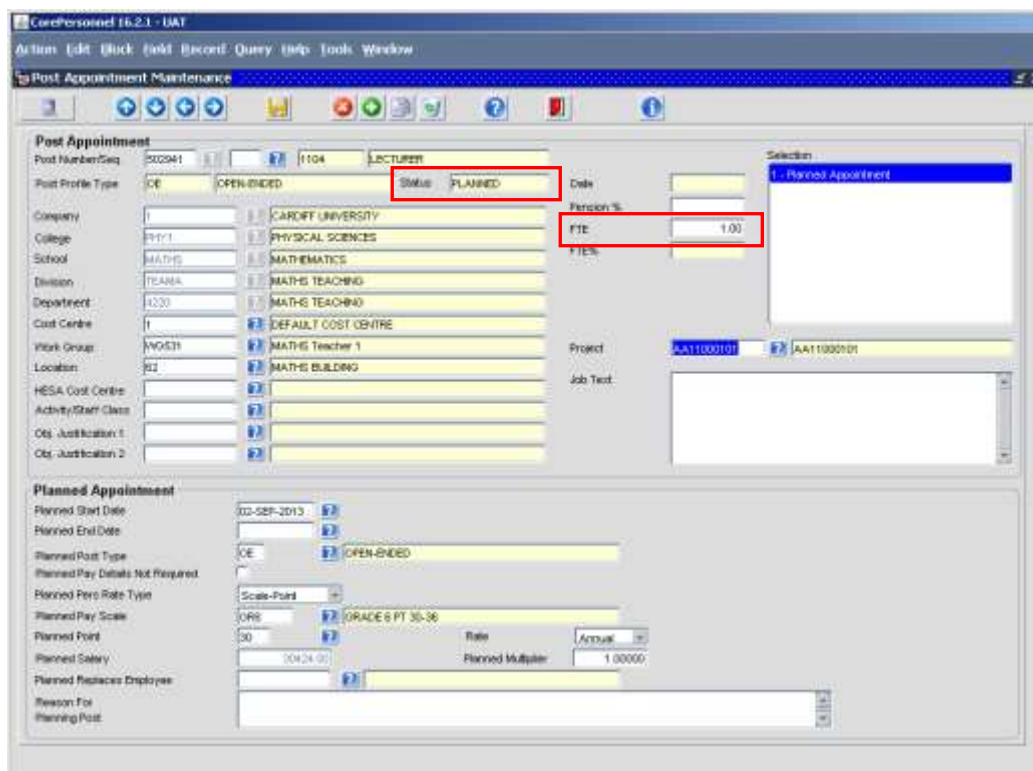
**Planned Pers Rate Type** field – select **Personal**

**Planned Pay Scale** field – select **Cardiff Fixed Salary**

Enter the fixed salary amount in the **Planned Salary** field and click 

**A fixed salary should only be used for employees being employed as KTP Associates or Marie Curie funded posts.**

- 6- Remember to populate the FTE field for the post on this screen (see below). If the post is full-time, then the FTE will be 1.00, if the post is part-time for 17.5 hours per week, the FTE should be 0.50, and a post of 21 hours per week would be 0.60. Click the yellow save button when you are happy that you have input all the information needed. The status of the post will now show as **Planned**, and not **Active**.



CorePersonnel 16.2.1 - UAT

Action Edit Block Field Record Query Help Tools Window

Post Appointment Maintenance

Post Number/Seq: 500941 / 1104 LECTURER

Post Profile Type: OE OPEN-ENDED Status: **PLANNED** Date:

Company: 1 CARDIFF UNIVERSITY Person %:

College: PHY-1 PHYSICAL SCIENCES FTE: 1.00

School: MATHS MATHEMATICS

Division: TEASMA MATHS TEACHING

Department: 1230 MATHS TEACHING

Cost Centre: 1 DEFAULT COST CENTRE

Work Group: WGES3 MATHS Teacher 1

Location: 02 MATHS BUILDING

HESA Cost Centre:

Activity/Staff Class:

Obs. Justification 1:

Obs. Justification 2:

Project: AA11000101 AA11000101

Job Text:

**Planned Appointment**

Planned Start Date: 02-SEP-2013

Planned End Date: 02-SEP-2013

Planned Post Type: OE OPEN-ENDED

Planned Pay Details Not Required: Scale-Point

Planned Pay Scale Type: ORR ORR PT 30-36

Planned Point: 30 Rate: Annual

Planned Salary: 00424.00 Planned Multiplier: 1.00000


Planned Replaces Employee: AA11000101

Reason For Planning Post:

## Authorising a Post


- 1- Using the drop down menu on the right hand side select **Authorise Appointment**.

The screenshot shows the 'CorePersonnel 16.2.1 - UAT' application window. The 'Post Appointment Maintenance' window is open, displaying various fields for post management. The 'Post Appointment' section includes fields for Post Number Seq (00094), Post Profile Type (OE), Status (PLANNED), and a list of attributes like Category, College, School, Division, Department, Cost Centre, Work Group, Location, HESA Cost Centre, Activity/Shift Class, Obj. Justification 1, and Obj. Justification 2. The 'Planned Appointment' section includes fields for Planned Start Date (02-SEP-2013), Planned End Date, Planned Post Type (OE), Planned Pay Details Not Required, Planned Pay Rate Type (Scale Point), Planned Pay Scale (GR6), Planned Point (00), Planned Salary (35424.00), Planned Replaces Employee, and Reason for Planning Post. The 'Selection' dropdown menu on the right is open, showing options: 1 - Planned Appointment, 2 - Actual Appointment, 3 - Authorise Appointment (highlighted), 4 - End Appointment, 5 - User Data, 6 - Comments, 7 - Status Detail, 8 - Cost Allocation, and 9 - Terms and Conditions.

- 2- Enter the date in the **Effective Date** field and click **OK**. Click  when you return to the **Post Appointment** screen. Note that the status of the post will have changed to **Authorised**.

The screenshot shows the 'CorePersonnel 16.2.1 - UAT' application window. The 'Post Appointment Maintenance' window is open, and the 'Authorise Appointment' dialog box is displayed. The dialog box has an 'Effective Date' field set to 02SEP13 and 'OK' and 'Cancel' buttons. The background window shows the same fields as the previous screenshot, but the 'Status' field is now 'AUTHORISED'.

The PSC Team will now be able to locate this post using the post number created and appoint to it. The post number that has been created should be put on the appointment form that is sent to HR via the e-recruitment system, following the recruitment campaign for this vacancy.

 If you lose your place and can't work out what stage in the appointment process you are, go back to the Core main menu, select **Core Personnel**→**Maintenance**→**Post Management**→**Post Appointment Maintenance** and enter the number of the post you need to review. Click **Search** and this will display the status of the post and any occupants that may already be appointed against it.

## Making a Post Dormant / Re-activating a Post

### Making a Post Dormant

There may be occasions when you will need to make a post dormant e.g. if an employee leaves the University and the post is no longer required

- 1- Select **Core Personnel** → **Maintenance** → **Post Management** → **Post Profile Maintenance**. Enter the **Post Number** for the original post and click **Search**
- 2- Double click against the relevant post and using the dropdown menu on the right hand side of the screen select **Make Dormant / Reactivate**. Enter the date on which the post will become dormant and click **OK**

**N.B.** It will not be possible to make the post dormant if other people occupy it or if you have a vacancy planned and/or authorised against it.

The screenshot shows the 'Post Profile Maintenance' window. The 'Post Status' is currently 'ACTIVE'. The 'Post Profile Type' is 'OFF-ENDED'. The 'Post Number' is '0001'. The 'Post Title' is 'SYSTEM TEST MPSS POST 1'. The 'Post Status' is 'ACTIVE'. The 'Post Profile Type' is 'OFF-ENDED'. The 'Managers Code' is '0001'. The 'Structure Code' is '0001'. The 'Auto Authorisation' and 'Auto Commencement' checkboxes are unchecked. The 'Hierarchy Definition' section shows a tree structure starting from 'CARDIFF UNIVERSITY' down to 'HUMAN RESOURCE MANAGEMENT'. The 'Category' is 'MPSS', 'Sub Category' is 'MANAGERIAL PROFESSIONAL SPECIALIST STAFF', 'Pay Scale' is 'MPSS', and 'PTE' is '20.00'. The 'Funding Expiry' is '1000', 'Requisition Number' is '1000', 'Estimated Annual Cost' is '1000', 'Analysis Code' is 'MPSS', 'Report To Post' is 'MPSS', and 'Substitution Post' is 'MPSS'. A dropdown menu is open on the right, showing options: 01 - Post Details, 02 - Job Profile, 03 - Plan Appointments, 04 - View Appointments, 05 - Competency Profile, 06 - Sanction History, 07 - Status Detail, 08 - Make Dormant/Reactivate (highlighted with a red circle), and 09 - Additional Info.

### Re-activating a Post

If you have a post which you have made dormant and you now need to re-appoint, you are able to re-activate this post which you have made dormant by following the instructions above.

## Chapter 3 – Changes

There are a number of changes that you may wish to make in Core but many of them require input from either the employees (via Core Portal) or the People Services Centre. The table below, names the most common changes made and outlines whose responsibility it is to make such changes.

<u>TASK</u>	<u>RESPONSIBILITY OF</u>
<u>Changing Personal Details</u>	
<ul style="list-style-type: none"> <li>• Changing Name</li> <li>• Contact Details</li> <li>• Visa/DBS</li> </ul>	<ul style="list-style-type: none"> <li>• People Services Centre</li> </ul> <p>Individual through Portal (if PC user) School if Non-PC user</p> <ul style="list-style-type: none"> <li>• People Services Centre</li> </ul>
<u>Changing Cost Allocations</u>	
<ul style="list-style-type: none"> <li>• No impact on relevant factor</li> <li>• Impact on relevant factor</li> </ul>	<ul style="list-style-type: none"> <li>• School</li> <li>• People Services Centre</li> </ul>
<u>Changing Hierarchy Against a Post/Appointment</u>	
<ul style="list-style-type: none"> <li>• College/School/Division/Department</li> <li>• Create a new College/ School/Division/Department</li> <li>• Process a restructure</li> </ul>	<ul style="list-style-type: none"> <li>• <b>BOTH</b></li> </ul> <p>School – create new post People Services Centre – appoint to new post</p> <ul style="list-style-type: none"> <li>• People Services Centre</li> <li>• People Services Centre</li> </ul>
<u>Changing Job Title</u>	
<ul style="list-style-type: none"> <li>• Admin Error</li> <li>• Change to JD or evolution of job</li> </ul>	<ul style="list-style-type: none"> <li>• School</li> <li>• People Services Centre</li> </ul>

<u>Changing Shift Type</u>	
<ul style="list-style-type: none"> <li>• Same Hours &amp; Non-Flexible Working Request</li> <li>• Managing STO shift patterns</li> <li>• Managing Hourly/variable staff</li> <li>• Flexible working Request</li> <li>• Increase/Decrease Hours</li> </ul>	<ul style="list-style-type: none"> <li>• School</li> <li>• School</li> <li>• School</li> <li>• People Services Centre</li> <li>• People Services Centre</li> </ul>
<u>Changing Organisational Structures</u>	
<ul style="list-style-type: none"> <li>• Work Group</li> <li>• Line Manager/Organisational Role</li> </ul>	<ul style="list-style-type: none"> <li>• People Services Centre</li> <li>• School</li> </ul>
<u>Other People Service Centre Changes</u>	
<ul style="list-style-type: none"> <li>• Changing fixed-term end dates</li> <li>• Converting to open ended</li> <li>• Changing career pathway</li> <li>• Changing salary</li> </ul>	<ul style="list-style-type: none"> <li>• People Services Centre</li> <li>• People Services Centre</li> <li>• People Services Centre</li> <li>• People Services Centre</li> </ul>



## Changing Personal Details

Now that Core Portal is live, the vast majority of changes to personal details should be managed by the employee. However, there may be circumstances when it's appropriate to update contact details on their behalf.

**Changing Title** will always be managed by the People Services Centre. This is because they need to obtain evidence for this change, such as a Marriage Certificate or Qualification.

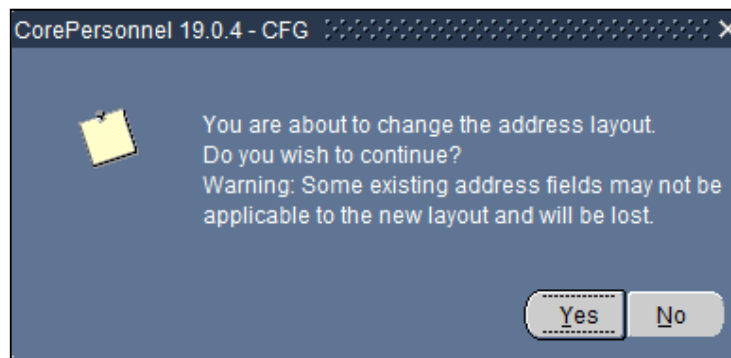
Similarly, changing **Visa or Disclosure and Barring Service** information is managed by the People Services Centre, as evidence of these changes must be documented.

### Changing Contact Details for an employee without computer access

- 1- From the Home Screen, go to **Core Personnel** → **Maintenance** → **Personal Profile**

Personnel No.	Name	Address	Status	Home No.	Date Started	Department
10144022	RUBBLE, BARNEY	28 Bedrock Street Beddington	OPEN-ENDED	01234 567891	28-MAR-2014	SDS ADMINISTRATION
10144042	RUBBLE, BETTY	162 Bedrock Street Finsbury London	FIXED TERM	0123456 78910	28-MAR-2014	UNIVERSITY LIBRARY OF

- 2- Search for the employee using the various search options and double click on their name to pull up their details
- 3- To change the address, click '**Edit Address**', the 'address maintenance' box will appear, enter the date you are making the change in the '**date effective**' field
- 4- Enter the 'Country' applicable to the address, you will receive the following pop up message:




5. Click yes, this will change the format of the address layout relevant to the Country chosen



6. Change the address and click **OK**, the amended details have now been saved.

The screenshot shows the CorePersonnel software interface. The main window displays the 'Personal Detail' section for a person with ID 18144406. An 'Address Maintenance' dialog box is open, showing 'Address Details'. The 'Date Effective' field is set to 1/1/2017, and the 'Country' field is set to UNITED KINGDOM. The 'OK' button is highlighted. In the background, the 'Save Address' button is also highlighted.

If you are changing a contact telephone number, overwrite the current number saved against the record and click  to save

## Changing a Cost Allocation

It is the responsibility of the Schools/Professional Services to change the funding against a post **when it does NOT impact an employee's relevant factor**. If there is a change to an employee's relevant factor, please forward the request to People Services Centre.

**N.B.** There are two places where cost allocations can be changed and it is important to distinguish between them. If you are changing the cost allocations relating to an existing appointment, you will access this via the personal profile. If you are changing the costs associated to a post's future appointments, then you can do this via the post-profile screen.

**Please Note:** If you change the costs associated to a post, this will not feed through to any existing appointments. It will only apply the change to future posts that you plan and authorise.

### To Change the Cost Allocation of an Existing Appointment

1. From the home screen, go to **Core Personnel** → **Maintenance** → **Personal Profile**
2. Find the employee whose appointment needs changing using the search functionality and double click on their name
3. From the right hand side option box, select **Post Profile** → **Appointment Details** → **Cost allocations**

The screenshot displays the 'Appointments' system interface. At the top, there is a table with columns: Appointment Status, Appointment ID, Start Date, End Date, Department, Job Title, Employee Status, and Substantive Date. The first row is highlighted in blue and contains the following data: 'Completed', '000006-14', '03-04-2014', 'CATERING AND BARS SERV', 'CHEF', 'OPEN-ENDED', and '13-JAN-2015'. Below the table, there is a form with various fields for appointment details, including 'Report To Manager', 'Fee Point', 'Internal Extension No', 'Leaving Code', 'Leaving Destination', 'Location After Leaving', 'Ending Reason', 'Probation Expiry Date', 'Review Date 1', 'Review Date 2', 'Probation Extension Date', 'Extension Reason', and 'Probation Completion Date'. At the bottom of the form, there are four buttons: 'View Appointment', 'Attend Appointment', 'Appointment Details', and 'End Appointment'. The 'Appointment Details' button is highlighted with a red box.

**Please note:** If an employee has multiple appointments, please ensure that the correct one is highlighted blue before clicking the appointment details button.



5. Amend the codes and click save

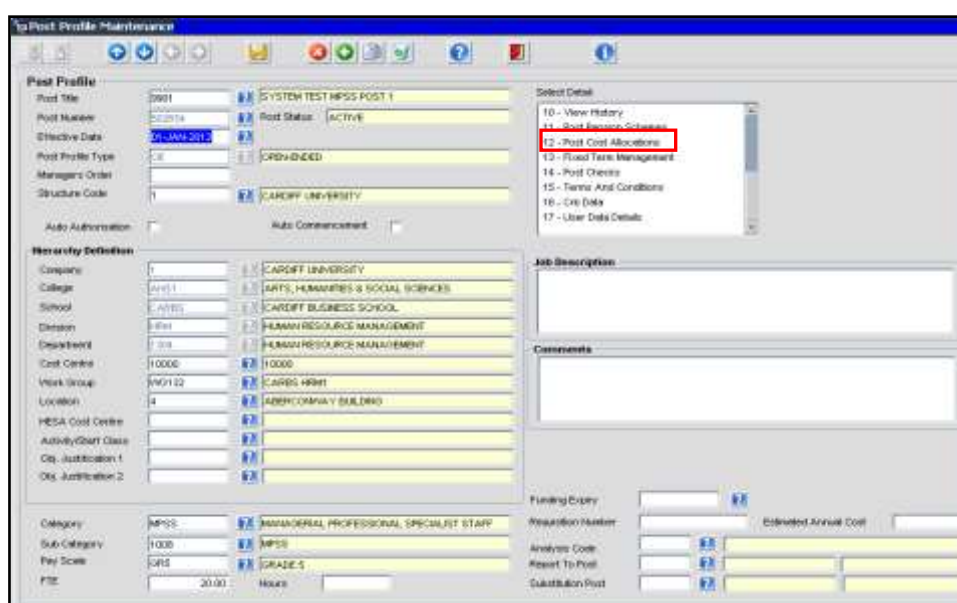
Scroll the bar to the right of the screen, you will then be able to edit the expense code

**Core Quirk:** If a post is funded by two codes, 50% for each, and you only need to amend one part of the funding for a specific period of time, Core will populate 100% costs relating to that period and require you to complete 100% funding information for the specified period of time.

## To Change the Cost Allocation of a Post's Future Appointments

There may be times when you want to change the cost allocation against a post which will affect all future appointments made against it. If this is the case, bear in mind that changing a cost allocation at post level won't have any effect on the cost allocations of all current occupants of the post. Cost allocations can be different at post level to those at appointment level.


- 1- Select **Core Personnel** → **Maintenance** → **Post Management** → **Post Profile Maintenance**
- 2- Search for the post and pull up the information by double clicking on the post
- 3- From the drop down menu on the right hand side select **Post Cost Allocation**



- 4- Either edit the existing funding code (see points 5-7 onwards) or add a new cost allocation, as appropriate.

**N.B.** In Core, you have to edit 100% of the cost allocations and these have to be edited in time-fragments that cannot overlap one another.

**Example Scenario** – We need to change 50% of the funding on the below appointment, from June 2014 until the end of the contract

- 5- After following the above instructions, click **'edit'** on the highlighted cost allocation. **Remember to scroll across to the right at the bottom of the cost allocation screen to add the expense code.**
- 6- Core will populate the full 100% costs relating to that period. To make an amendment to these, you can either free text the cost codes (ensuring to have caps lock on for the project codes), or search for the codes using the 
- 7- Click **'Save'**

8- Amend the end date of the allocation, as appropriate

Start Date: 01-JAN-2014

End Date: 31-DEC-2014

%	Cost Centre	Description	Project Code	Description	Delete
50	11090	11090	AA11090101	AA11090101	Delete
			AA11090102	AA11090102	Delete
					Delete
					Delete
					Delete
					Delete
					Delete

Save Cancel Delete

9- You will be brought back to the full cost allocation screen, click '**add allocation**' and input the full 100% cost for the remainder of the contract and click '**Save**'

Start Date: 01-JAN-2014 End Date: 31-DEC-2014 %: 50 Cost Centre: 11090 Description: 11090 Project Code: AA11090102 Description: AA11090102

Start Date: 01-JAN-2014 End Date: 31-DEC-2014 %: 50 Cost Centre: 11090 Description: 11090 Project Code: AA11090102 Description: AA11090102

Add Allocation Save Cancel Delete

**N.B.** The changes that you make in the Cost Allocation screen will not feed into the 'View Appointment' screen, and the highlighted fields will remain as the previous cost allocation. If you require this to be amended, please contact the People Services Centre

**Common Error Message:** 'Start date cannot be before or overlap with another allocation'.

Double check the dates that you are entering the funding code for. Cost allocations can only be entered in date order. For example If you have a cost allocation that covers January – December and you only want to change March, you would need to edit the end date from the January - December allocation, to a date in February. Then, input the new/changed cost allocation for March, and then **re-add** the original allocation to cover April – December. You cannot input dates in a non-sequential order, Core will not allow you too.



## Adding Data to a User Defined Field

A User Defined Field (UDF) is used to hold additional data about an employee or the requirements of the post. They are used for various purposes including fixed term management, DBS details, preferred language choice etc. and can be accessed from the Person Profile or Post Management screens. Please refer to the table on the next page on where to find the relevant UDFs.

At the appointment stage, you can use different UDF's to record information that is specific to the employee occupying the appointment. Some UDFs have specific security access assigned to them and are only visible to certain individuals (i.e. School Managers can see sickness absence management information), but others have open access and are visible to those who have been assigned personnel access. Access to UDFs is dependent upon the organisational role you have been designated within the system.

- 1- Log into Core using your username and password
- 2- Select **Core Personnel** → **Maintenance** → **Personal Profile**
- 3- Enter the name of the person and click *Search*. Find the relevant person and double click against their record
- 4- Using the drop down menu on the right hand side select **User Data**. Using the drop down options at the top of the screen (arrow next to **All**) select the **User Defined Field** you want to add/edit and click on the **New** or **Edit** button.

The screenshot shows a software window titled "User Maintenance" with a sub-header "Select User Defined Field". Below the sub-header is a dropdown menu labeled "User Defined Field" with "All" selected. The main area contains a table with the following columns: "Source", "User Defined Field", "From Date", "To Date", and "Description". The table is currently empty. At the bottom of the window are three buttons: "New", "View/Edit", and "Close".

- 5- The **Date From** field may or may not be relevant and this depends on the type of User Defined Field you are creating. If it is relevant please complete this field with the relevant date
- 6- Complete the User Defined Field and when all data has been entered click **OK** to save the record and **OK** again against the next prompt



Below is a list of all current UDFs and the level at which they should be stored.



USER DEFINED FIELD	PERSON?	APPOINTMENT?
A & I Checks	Y	
Appraisal Data		Y
Change Needed?		Y
Citation Name	Y	
Clinical Registration		Y
Contract Amendment Chase		Y
Disciplinary Details		Y
Disclosure and Barring Service – DBS (Known as CRB on CORE)		Y
Disclosure of Outside Interest	Y	
Employee Language Preference	Y	
File out with	Y	
Fixed Term Management		Y
Grievance Details		Y
Home Office Licencing		Y
Hourly Paid Information		Y
HR Contract Chase Details		Y
Job Evaluation for Recruitment		Y
New Starter Union Interest	Y	
NHS Honorary Contract		Y
Pension Scheme Opt out	Y	
Postgraduate Research Interests	Y	
Post checks		Y
Probation		Y
Redundancy Committee		Y
Relocation	Y	
Sickness Interviews		Y
Sickness Management		Y
Term Time		Y
TUPE Transfer Information	Y	
Visa Details	Y	

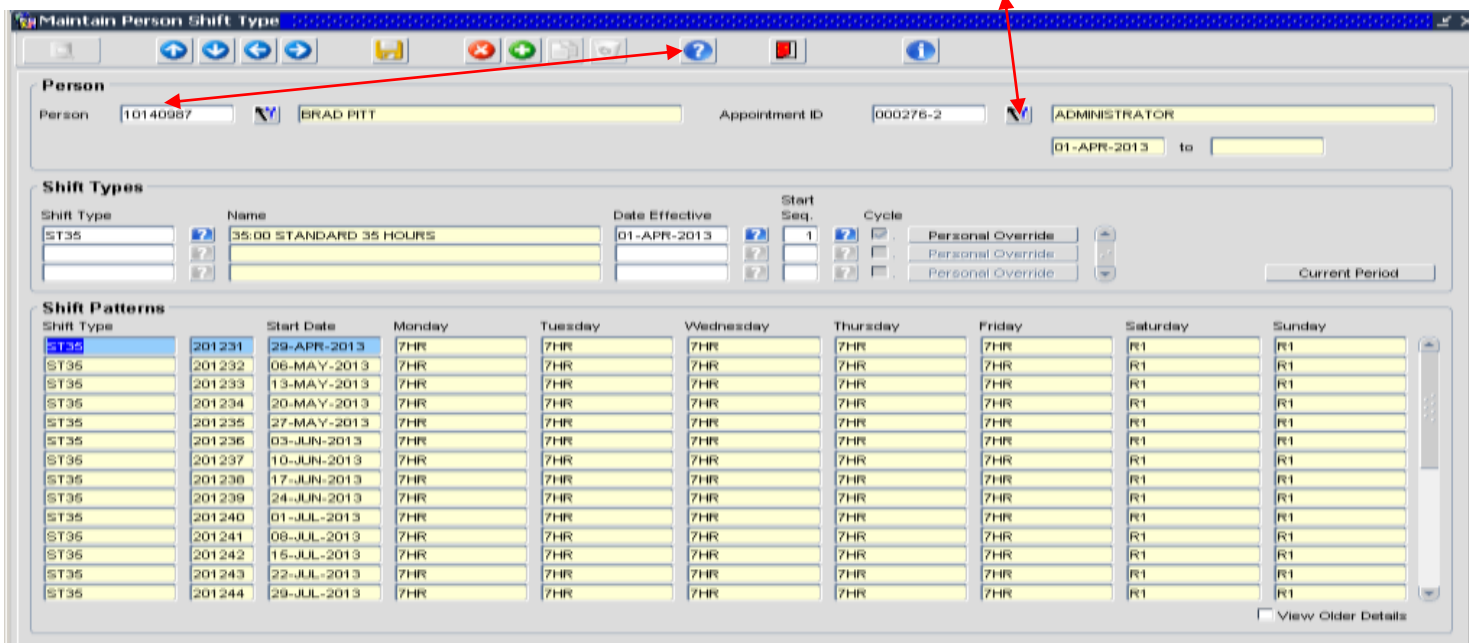
## Changing Shift Types

There are several occasions when it is appropriate for Schools/Professional Services to change an employee's shift type, without needing to contact HR. These are when the employee is working the **same number of hours and has not made a Flexible Working Request**, when an employee is working **Semester Time Only** and when an employee is on an **hourly/variable employment contract**. In all other circumstances, you must contact the People Services Centre to make the change.

**Note:** *It is not possible to change a shift type if the date on which you want to apply the new type is in the past. For example if on 1 September you realise you need to change the shift type from 1 August the system won't allow you to do this because payroll/absence information will already have been generated for this period.*


### Same Hours & Non-Flexible Working Request

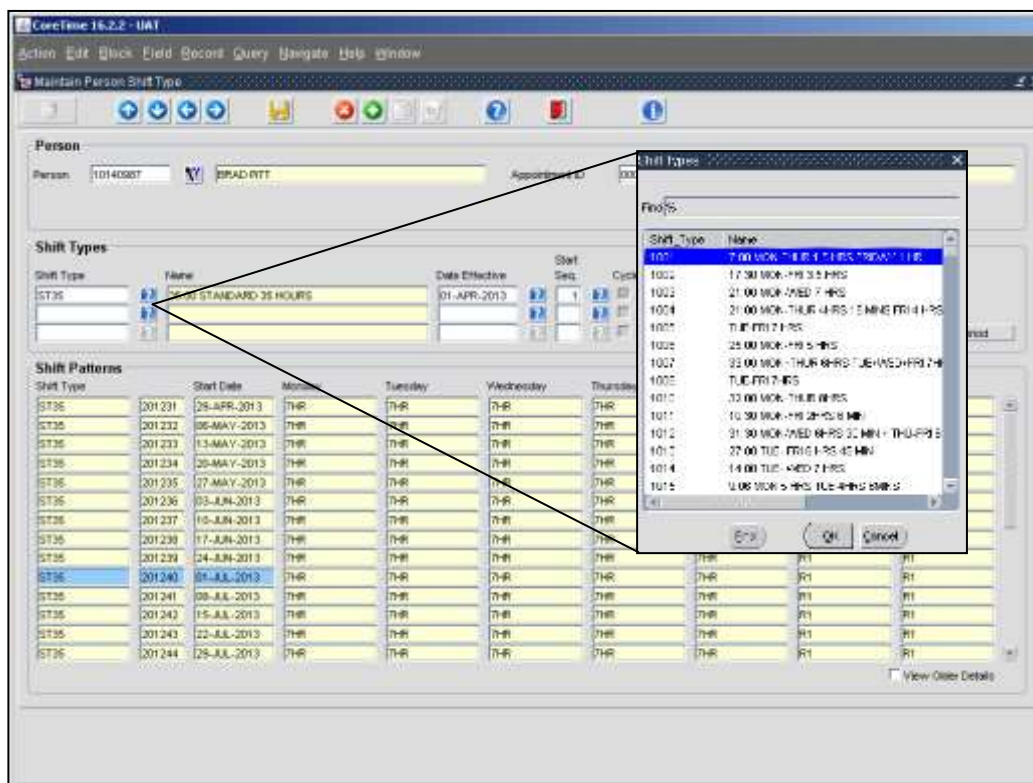
- 1- Select **Core Time**→**Time Mgt**→**Maintain Person Shift Type**
- 2- Search for the employee either by entering their HR number, or clicking on 
- 3- Select the appropriate appointment (if applicable) using the  as below



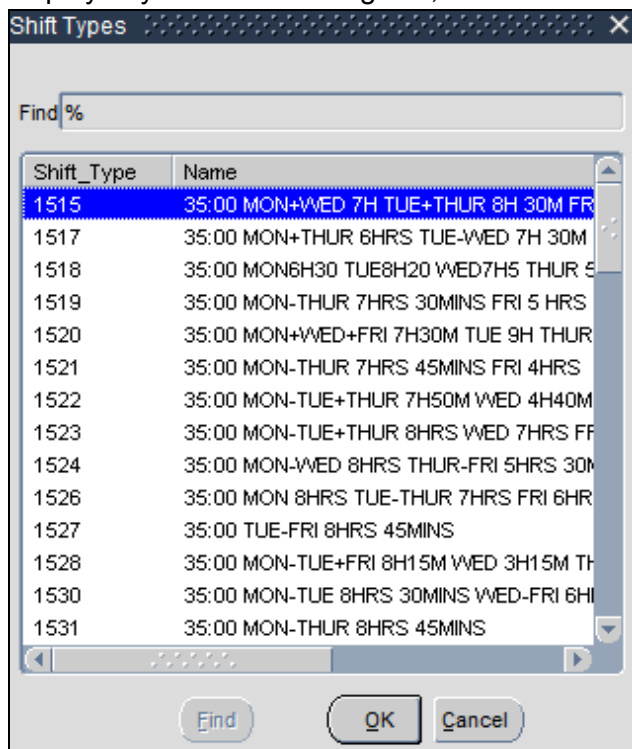
Shift Type	Start Date	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
ST35	201231 29-APR-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201232 06-MAY-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201233 13-MAY-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201234 20-MAY-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201235 27-MAY-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201236 03-JUN-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201237 10-JUN-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201238 17-JUN-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201239 24-JUN-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201240 01-JUL-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201241 08-JUL-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201242 15-JUL-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201243 22-JUL-2013	7HR	7HR	7HR	7HR	7HR	R1	R1
ST35	201244 29-JUL-2013	7HR	7HR	7HR	7HR	7HR	R1	R1

- 4- In Core, we cannot delete an existing shift pattern, instead, we have to enter the new shift type on the line below the existing one. Click in the white box below the 'shift type' to activate the line

- 5- Click on the  and the search box will open



- 6- To filter the shift types, type the number of hours that the employee will work per week and apply a Boolean search (surrounded by % signs). For example, if Brad Pitt was compressing his hours, we would search %35% into the field and the options will filter to display any result containing '35', as follows:




7- Select the applicable shift type and click 'Ok'. If the shift type you're looking for does not appear, contact [people@cardiff.ac.uk](mailto:people@cardiff.ac.uk). It will need to be created for you. In your request make sure you list the days to be worked and the hours to be worked each day

8- Enter the date from which this shift type is applicable

9- The 'Start Seq' column determines how often the work pattern in that line is to rotate and usually this will be entered as '1' as it is a one week rotating shift pattern

However, if the employee worked one pattern in week one, then a different pattern in weeks two, three or four then we need to apply the correct start sequence. This will be determined by the date of the change. For example, if on the date of change the pattern of work is that contained in week 3 then the start sequence should be 3

10- Click  to save and the employees shift pattern will update in the shift patterns screen, see below.

11. Scroll down to find the relevant dates you just amended to check your entry

## Updating Semester Time Only Employees

When employees work Semester Time Only, it is important to reflect the weeks that they are not in work. If these are not updated when an employee logs into Core Portal during the weeks that they are off, it will appear as if they are in work. **In addition to this, there is a risk that those employees who are hourly paid may receive overpayment if their payment schedules are set to automatically affect payroll.**

There are two ways of managing these patterns.

1. **Contact the People Service Centre with the full year's shift type and they can define this in the system**

**Pros:** You only need to enter the shift patterns once per annum & there is no risk of overpayment.

**Con:** If the employee reports sick during a rest period, you will need to manually amend the shift type for the weeks that they are absent.

An example of this would be; notify to the People Services Centre that you require an annual shift pattern as follows:

1 October 2013 – 1 December 2013 35h: 7h Mon-Fri,  
2 December 2013 – 5 January 2014 Personal Override  
6 January 2014 – 1 April 2014 35h, 7h Mon-Fri  
2 April 2014 – 30 April 2014 Personal Override  
1 May 2014 – 30 June 2014 35h, 7h Mon-Fri  
1 July 2014 – 30 Sept 2014 Personal Override


2. **Manually input the 'Personal Override' shift type, for every period of non term-time working.**

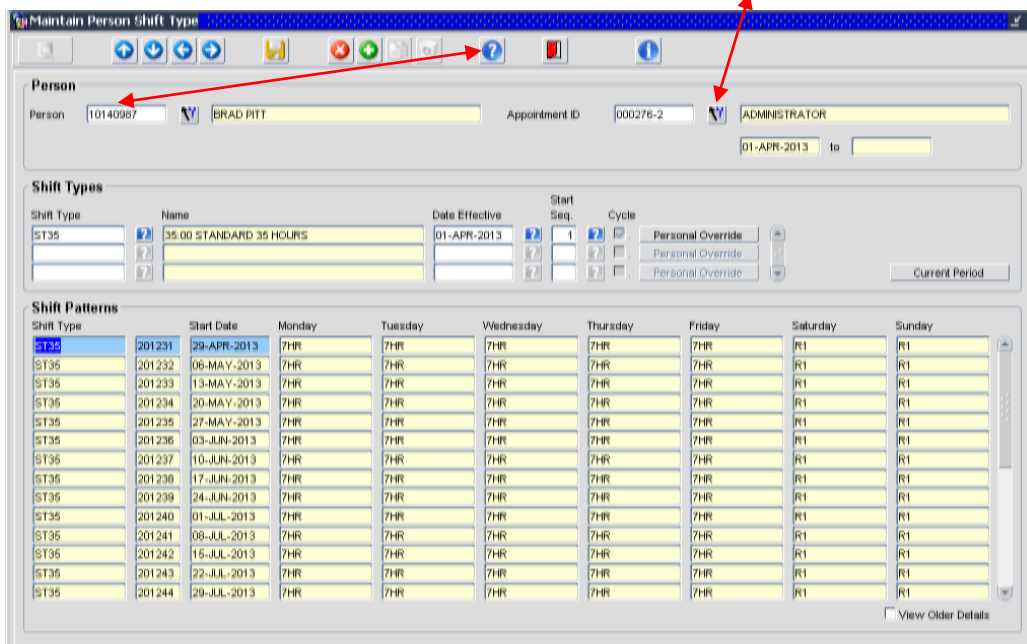
**Pros:** Easier to amend shift patterns if you need to report the employee sick.

**Con:** Requires updating every time the employee goes between a rest and working period.



1- Select **Core Time**→**Time Mgt**→**Maintain Person Shift Type**

2- Search for the employee either by entering their HR number, or clicking on  or 

- 3- Select the appropriate appointment (if applicable) using the  as below:



**Maintain Person Shift Type**

Person: 10140987  BRAD PTT Appointment ID: 000276-2  ADMINISTRATOR  
01-APR-2013 to

**Shift Types**

Shift Type	Name	Date Effective	Start Seq.	Cycle	Personal Override
ST35	35.00 STANDARD 35 HOURS	01-APR-2013	1	1	Personal Override
					Personal Override
					Personal Override

Current Period

**Shift Patterns**

Shift Type	Start Date	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
ST35	201231	29-APR-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201232	06-MAY-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201233	13-MAY-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201234	20-MAY-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201235	27-MAY-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201236	03-JUN-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201237	10-JUN-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201238	17-JUN-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201239	24-JUN-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201240	01-JUL-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201241	08-JUL-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201242	15-JUL-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201243	22-JUL-2013	7HR	7HR	7HR	7HR	R1	R1
ST35	201244	29-JUL-2013	7HR	7HR	7HR	7HR	R1	R1

View Older Details

- 4- In the white box below the existing shift type, type 'PO'. Personal Override will populate



**Shift Types**

Shift Type	Name	Date Effective	Start Seq.	Cycle	Personal Override
ST35	35.00 STANDARD 35 HOURS	01-AUG-2013	1	1	Personal Override
PO	Personal Override	01-SEP-2013	1	1	Personal Override
					Personal Override

Current Period


- 5- In the 'Date Effective' field, select the first date that the employee's rest period begins, enter '1' in the 'Start Seq' field
- 6- Then, in the white box below, complete the 'Shift Type', 'Date Effective' and 'Start Seq' boxes for the employee's return shift



**Shift Types**

Shift Type	Name	Date Effective	Start Seq.	Cycle	Personal Override
ST35	35.00 STANDARD 35 HOURS	01-AUG-2013	1	1	Personal Override
PO	Personal Override	01-SEP-2013	1	1	Personal Override
ST35	35.00 STANDARD 35 HOURS	01-OCT-2013	1	1	Personal Override

Current Period




- 7- Click  to save, the shift type will update
- 8- Repeat steps 1-7 for every time the employee is not scheduled to be in work

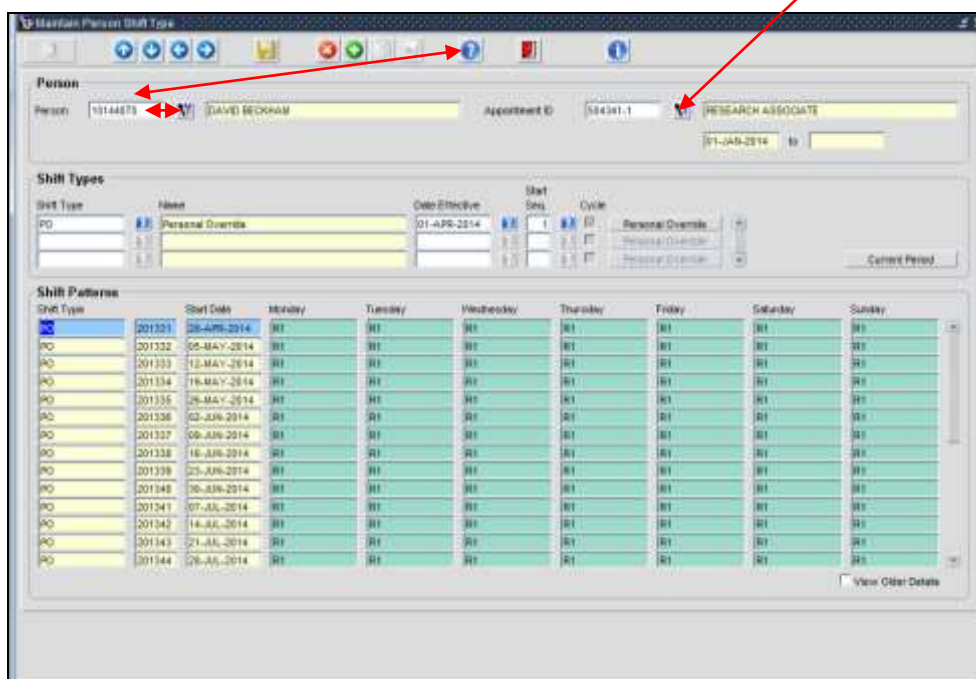


## Recording Shift Patterns for Hourly/Variable Staff

In some instances, an employee may work varying hours or we may not know the exact hours that the employee works. In these circumstances, we need to set the employee to the 'Personal Override' shift type.

**N.B.** The Personal Override shift type records the employee as having every day as a rest day. As a result, Core will not let you record an absence against these employees without first amending their shift type.

- 1- Select **Core Time**→**Time Mgt**→**Maintain Person Shift Type**
- 2- Search for the employee either by entering their HR number, or clicking on  or 
- 3- Select the appropriate appointment (if applicable) using the  as below:



**Maintain Person Shift Type**

Person: 18144671 (DAVID BECKHAM) Appointment ID: 184341-1 RESEARCH ASSOCIATE

Shift Types:

Shift Type	Name	Date Effective	Start Seq	Cycle
PO	Personal Override	01-APR-2014	1	1

Shift Patterns:

Shift Type	Start Date	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
PO	201331	R	R	R	R	R	R	R
PO	201332	R	R	R	R	R	R	R
PO	201333	R	R	R	R	R	R	R
PO	201334	R	R	R	R	R	R	R
PO	201335	R	R	R	R	R	R	R
PO	201336	R	R	R	R	R	R	R
PO	201337	R	R	R	R	R	R	R
PO	201338	R	R	R	R	R	R	R
PO	201339	R	R	R	R	R	R	R
PO	201340	R	R	R	R	R	R	R
PO	201341	R	R	R	R	R	R	R
PO	201342	R	R	R	R	R	R	R
PO	201343	R	R	R	R	R	R	R
PO	201344	R	R	R	R	R	R	R


☐ View Other Details

- 4- Under '**Shift Type**', type '**PO**'
- 1- Press the tab key to move to the '**Date Effective**' and '**Start Seq**' fields, as appropriate
- 2- Click  to save.

## Changing a Job Title

There are many circumstances where you may need to change an employee's job title. In the majority of circumstances (including but not exclusive to, re-grading, job evolution/evaluation & academic promotion), you will need to submit the request to change a job title to the People Services Centre.

**If you need to change the job title of ALL staff within a post and for the full history of that post, it can be done as follows:**

- 1- Select **Core Personnel** → **Maintenance** → **Post Management** → **Post Profile Maintenance** → **Search for the post**
- 2- Bring up the details regarding the post that you need to make amendments to, by typing in the post number or use the search functions to find the post
- 3- Once the details have loaded, select the new job title by clicking the  and searching for the job title as appropriate. Once found, click OK.

**Please Note:** The University has only loaded generic job titles into Core. The reasons for this are manifold, and will help us to produce informative reports from the system. If the job title that you require is not there, and none of the generic titles loaded are suitable, please contact the People Services Centre and request that the title is loaded into the system.

The screenshot displays the 'Post Profile Maintenance' application window. The window has a menu bar with 'Action Edit Back Field Record Query Help Tools Window' and a toolbar with various icons. The main content area is divided into several sections:

- Post Profile:** Contains fields for Post Title (ADMINISTRATOR), Post Number (100001), Effective Date (01 JAN 2013), Post Profile Type (OPEN-ENDED), Managers Order (1), Structure Code (1), Auto Authorization (unchecked), and Auto Commencement (unchecked).
- Hierarchy Definition:** A tree view showing the organizational structure, including CARDIFF UNIVERSITY, ARTS, HUMANITIES & SOCIAL SCIENCES, PLANNING & GEOGRAPHY, UCLAN RESEARCH, GREY AND PLEASANT LAND, and various cost centres.
- Job Description:** A text area for describing the job.
- Comments:** A text area for adding comments.
- Funding Expiry:** A date field.
- Requisition Number:** A text field.
- Estimated Annual Cost:** A text field.
- Analysis Code:** A text field.
- Report To Post:** A text field.
- Substitution Post:** A text field.

A 'Find Post' dialog box is open in the top right corner, showing a list of search results. The results include 'DATA-BASE MANAGER', 'DATA-BASE PROGRAMMER', 'NEW', 'DEANARCH-HEAD OF SCHOOL', 'LEADS TRNGS TAP WORK', 'DEANARCH SUPPORT ASSISTANT', 'DEANARCH SUPPORT OFFICE', 'NEW', 'DEMONSTRATOR', 'DENTAL AUXILIARY (LAW/CLINICAL SCHEME)', 'DENTAL FOUNDATION MANAGER', 'DENTAL FOUNDATION TRAINING ADVISOR', 'DENTAL INSTRUCTOR', and 'DENTAL POSTGRADUATE PRACTICE TUTOR'.

- 4- The new job title will populate at the top of this window. Click  to save.



- 5- Making these changes will only **partially** feed through to the '**View Appointment**' screen and a change will still be required by the People Services Centre. Please contact them to advise them of this change.

The screenshot shows the 'Amend Appointment Details' screen for 'Lisa Gemard'. The 'Post Details' section includes fields for Post Number (000275), Post Profile Type (OE), Effective Date (01-FEB-2004), Target End Date, Planned End Date, and Status (Completed). The 'Hierarchy Details' section includes fields for Company (CARDIFF UNIVERSITY), College (PHYSICAL SCIENCES), School (ENGINEERING), and Division (SUPPORT). The 'Appointment Details' section includes fields for Post Type (OE), Project (AA25001001), Job Category (ADMINISTRATION MANAGER), Job Title (ADMINISTRATION MANAGER), and Employee Status (OE). The 'Job Title' field is highlighted with a red box and labeled 'Non-updated'. The 'Post Number' field is highlighted with a red box and labeled 'Updated'.


If you have a generic bucket post, and want to amend a specific part of the job title to one or more employees (e.g. Lecturer to Lecturer in Applied Statistics) contact People Services Centre. The University is taking the stance that generic job titles should be used wherever possible. Specific job titles, such as Lecturer in Applied Statistics, can be added to the Job Text field by People Services Centre on request. There is **no** need to create a new post.

### **If you have a bucket post and only one employee's job title is changing**

You will need to create a new post for the employee whose job title is changing. Once created, contact the People Services Centre with a request to move that employee into the appropriate appointment. Full guidance on creating a post can be found in chapter 1 of the manual.



- 4- For employees with multiple roles, add another record. Click into the white **Date From** field and click the green + icon at the top of the page. Follow the same steps as outlined above

**N.B.** To amend a role previously assigned (this might also include adding an end date against an organisational role), follow steps 1 + 2 and find the record you wish to change. Make the relevant amendments then click  to save your changes.

The deletion of a role previously assigned is not recommended because it creates a gap in the organisational role history

**REMEMBER:**

Every organisational role assigned **must** have an end date. Unless the role is being occupied on a short term basis then the end date should be the default of 31 December 2099. If there is no end date entered there is a risk that some of the automated workflow won't be triggered and important updates/actions missed as a result.

Fixed term staff don't have to have the end date of their contract entered here and can have the default end date applied. In the event their contract terminates on their fixed term end date they will be processed as a leaver and won't then carry assigned organisational role.

## Amend an Organisational Role/Change Line Managers

Organisational roles determine who holds certain responsibilities within Core and Core Portal. The most frequently used organisational role will be 'Line Manager (leave)', which gives the responsibility of line management to a particular work group and dictates who is responsible for approving leave requests (or in future manager requests) sent through Core Portal.

If you need to **change the work group** that an employee is in you will need to raise the request with the **People Services Centre**.

**N.B.** Organisational Roles will remain with individuals for as long as they are in the system and the role has not ended. So, if an employee moves School/Professional Service prior to their scheduled end, they will hold the organisational role(s) for their old School, until these are actively ended.

**How do I know whether I need to change a work group, or change an organisational role?**

Consider the example:




<u>Work Group – WG123</u>	<u>Line Manager</u>
Professor Brian Cox Sir Stephen Fry Sir Michael Parkinson	Heston Blumenthal

In this structure, Heston would have the Organisational Role of 'Line Manager (leave)' for the Workgroup WG123.

If Heston is leaving, or the responsibilities of that work group were being passed to another individual, then the **organisational role** needs changing – namely, someone else will need to be assigned to Organisational Role of '*Line Manager (leave)*' for WG123.

If only Stephen was to be line managed by a different individual but Brian and Michael will continue to be line managed by Heston, then Stephen's **work group** needs changing. In this instance, please contact the People Service Centre with details of the workgroup that Stephen is to be moved into.

## To End/Amend an Organisational Role

- 1- Ensure that you have made a note of the workgroup that you need to amend
- 2- From the Homescreen, select **Core Personnel** → **Reference** → **Maintain Organisational Roles by Person**
- 3- Use  to find the name or personnel number of the first employee whose organisational role(s) you need to amend


**N.B.** If an organisational role needs to move from one person to another, you will need to first end the organisational role against the existing role holder and then add the organisational role to the new role holder. **Always end existing organisational roles, do not delete them.**

e.g. If Heston was no longer managing WG123, I would need to end the Organisational Role against Heston as well as assign it to the new manager of WG123.



- 4- Using the drop down options, select the **Role** and **Org Group** that are applicable to this Organisational Role e.g. For Line Managers, you will select '**Line Manager (leave)**' under **Role**, and '**Work Group**' under **Org Group**
- 5- The '**Date From**' will default to today's date but amend if applicable
- 6- **Date To** (A default end date of **31 Dec 2099** should be used. When a role holder leaves any organisational roles assigned to them will be removed as part of the leaver process with any default end date entered being overwritten). It should be part of your best practice to review organisational roles on a regular basis and if you are aware that an individual is leaving the role or the University then you can enter an end date against the record

Fixed term staff don't have to have the end date of their contract entered here and can have the default end date applied. In the event their contract terminates on their fixed term end date they will be processed as a leaver and won't then carry assigned organisational role.

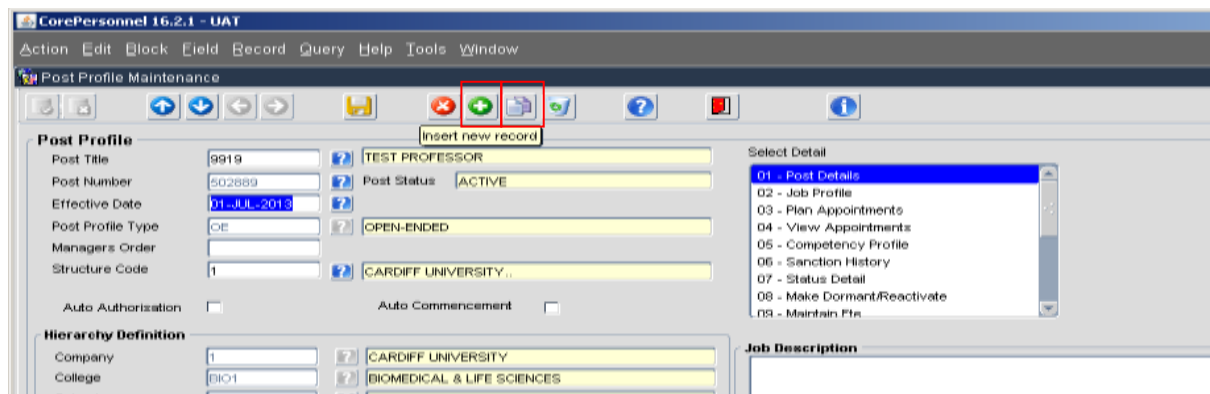
- 7- Under '**Org Group Item**', use the blue question mark to select the appropriate item
- 8- Click  to save.

## Hierarchy Amendments - Duplicating/Copying Posts

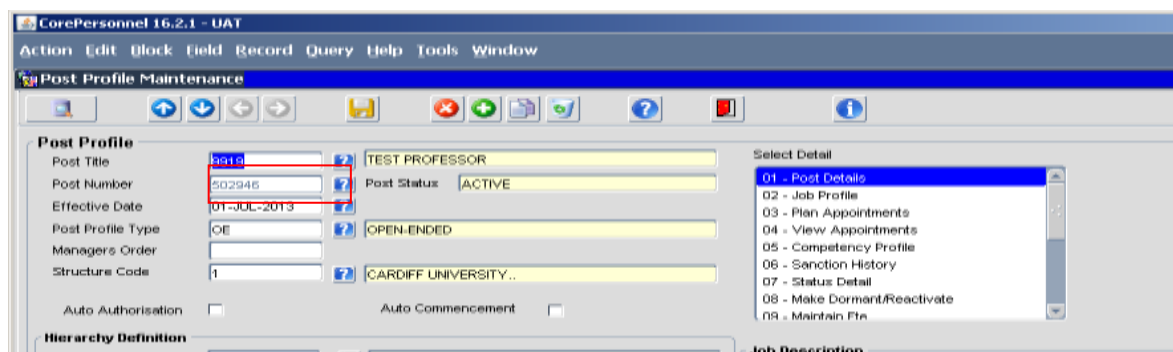
There may be a time when an individual or post moves Divisions or Departments, resulting in the need to amend a hierarchy definition in Core. However, there is a restriction in Core that prevents its users from changing the hierarchy definition after the post has planned. As such, it is necessary to create a new post and appoint the person to it. The easiest way to do this is to copy a post you want to make changes to and then make the amendments

### Making Amendments to the Hierarchy

- 1- From the Home Screen, go to **Core Personnel** → **Maintenance** → **Post Profile** and search for the post you want to copy
- 2- Click the green cross icon at the top of the screen to insert a new record. The screen will clear itself of all entries



- 3- Now press the stacked files icon at the top of the screen to duplicate the previous record. It will repopulate the fields with the exact data of the post you just copied. Click **Save** and remember to take a note of the new post number it generates



**Core Quirk:** You have to come out of the record and go back in using the new post number before you can amend the hierarchy. Once the hierarchy change has been applied save the record then plan and authorise an appointment to enable PSC to move the person/people into the new post

- 4- Once the post has been created, planned and authorised contact the People Services Centre and notify them of the need to move the employee's appointment
- 5- When you have confirmation that the employee has moved posts, go to **Core Personnel** → **Maintenance** → **Post Profile** → **Post Profile Maintenance** and search for the old post number
- 6- If the old post no longer has active appointments against it, it is important to make the old post dormant. This can be done by selecting '**Make Dormant/Activate**' from the right hand selection panel:

- 7- Input the date that the employee moved position and click '**Ok**', followed by .

**If there are members of staff still in the old post**, then we must reduce the FTE against that post. In such circumstance, select '**Maintain FTE**'



- 8- Ensure that 'update FTE' is selected and input the FTE of the people who have moved post, preceded by a minus sign. For example, if you have moved 1 full time and 1 half-time employee from the old post, I would type -1.5 in the FTE box:

The screenshot displays a software interface for managing post profiles. The main window is titled 'Post Profile' and contains several sections:

- Post Profile:** Fields for Post Title (ADMINISTRATIVE MANAGER), Post Number (10000), Effective Date (01 JAN 2013), Post Profile Type (FTE), Manager's Code, and Standard Code (CARDIFF UNIVERSITY).
- Auto Authorization:** Checkboxes for 'Auto Authorization' and 'Auto Commenced'.
- Hierarchy Definition:** A list of organizational units including Company (CARDIFF UNIVERSITY), College (ARTS, HUMANITIES & SOCIAL SCIENCES), School (CARDIFF LAW SCHOOL), Division (CARDIFF LAW SCHOOL), Department (CARDIFF LAW SCHOOL), Cost Centre (10000), Work Group (CLAVE ADMIN), Location (LAWBUILDING), and various other codes.
- Category:** Fields for Category (ADMINISTRATIVE SUPPORT), Sub Category (ADMIN SUPPORT), Pay Scale (GRADE 4 FT 15-23), and PTE (1.0).
- Selected Detail:** A list of options including 'Job Profile', 'Post Appointment', 'New Appointment', 'Compensation Profile', 'Sanction History', 'Status Detail', 'Status Transferred From Profile', and 'Maintain FTE' (which is selected).
- Job Description:** A field for 'Job Manager'.
- Comments:** A text area for additional information.
- Funding Entry:** Fields for 'Funding Entry', 'Requisition Number', 'Analysis Code', 'Report To Post', and 'Substitution Post'.

Overlaid on the bottom right is a smaller dialog box titled 'Maintain FTE'. It has two tabs: 'Transfer FTE' and 'Update FTE' (which is active). The 'Update FTE' tab contains the following fields:

- Post Number: 10000
- Effective Date: 01 JAN 2013
- FTE: -1.5
- Approved By: CARDIFF PEOPLE
- Comments: FTE reduced as George Michael and David Steele have moved from SOURCE to SOURCE (change of Department)

Buttons for 'Save' and 'Cancel' are at the bottom of the dialog box.

- 9- Click 'Save'

## **To create a new Division/Department within your School/Professional Service hierarchy**

- 1- Raise the request with the People Service Centre, detailing the preceding levels of hierarchy relevant.
- 2- A change to a hierarchy will require formal approval and will not be actioned until this has been obtained. Please bear in mind that this may take some time to apply.

## Seeing Future Changes to be made by PSC

Core works in real-time, so when an employee has any temporary amendments to their contract, Core will not display the end of that amendment. For example, if an employee had a temporary increase in hours, Core would not show a future record that decreased the hours back to their original. Consequently, any scheduled future changes to an employee's record have to be diarised. This is managed in one of two ways.

### If the Future Change was processed in Compel...

...then the People Services Centre will know to make the change at the appropriate month. There are scheduled reports run each month, from Core, to identify any future dated records in Compel that need to be mirrored in Core.

### For all other Future Dated Changes...

...The People Service Centre make notes of what they need to process via a User Defined Field called '**Change Needed?**' You can access the information stored in this field as follows:

- 1- Select **Core Personnel** → **Maintenance** → **Personal Profile**
- 2- Find the employee who you think a change might apply to and double click on their name
- 3- Select **Post Profile** → **Appointment Details** → **User Data** → select '**Change Needed?**' from the drop down menu.

The screenshot shows the 'Post Appointment Maintenance' window. The 'Post Appointment' section includes fields for Post Number (20000), Post Profile Type (OE), Status (COMPLETED), Date (01-AUG-2013), and Person % (100%). The 'Planned Appointment' section shows Planned Start Date (01-AUG-2013), Planned End Date, Planned Post Type (OE), Planned Pay Details Not Required, Planned Pay Rate Type (Scale Point), Planned Pay Scale (GRS), Planned Point (GRADE 5 PT 23-28), Planned Salary (24756.00), and Planned Multiplier. A 'Select User Defined Field' dialog is open, showing a table with the following data:

Source	User Defined Field	From Date	To Date	Description
Appointment	Change Needed?		01-08-2013	Return to 17.5 hours

## How to see a History of Changes


There is an option within Core to see a history of an individual's post. This is useful to see whether or when a change such as job title, fixed-term renewals, responsibility allowances and academic promotions have been processed.

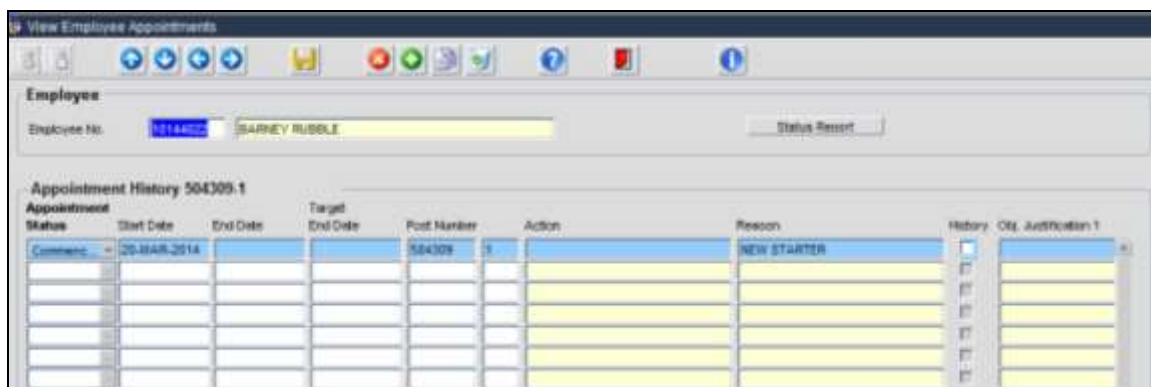
To access this screen, complete the following:

- 1- **Core Personnel** → **Maintenance** → **Personal Profile**
- 2- Find the employee and double click on their name
- 3- Select **Post Profile** → **Appointment Details** → **View Employee Appointments** from the drop down menu.

- 4- To see the appointment details related to that period, select the line of interest and click on the Appointment ID field of the relevant row. Click on the Drill down button which will now be available

Appointment ID	Post Title	Appointment Status	Start Date	End Date	Post Type	FTE	Substantive Date
504308-1	29 ADMINISTRATIVE ASSISTANT	Completed	20-MAR-2014		OPEN-ENDED	1.00	20-MAR-2014

5. Click on the relevant row and click  the button



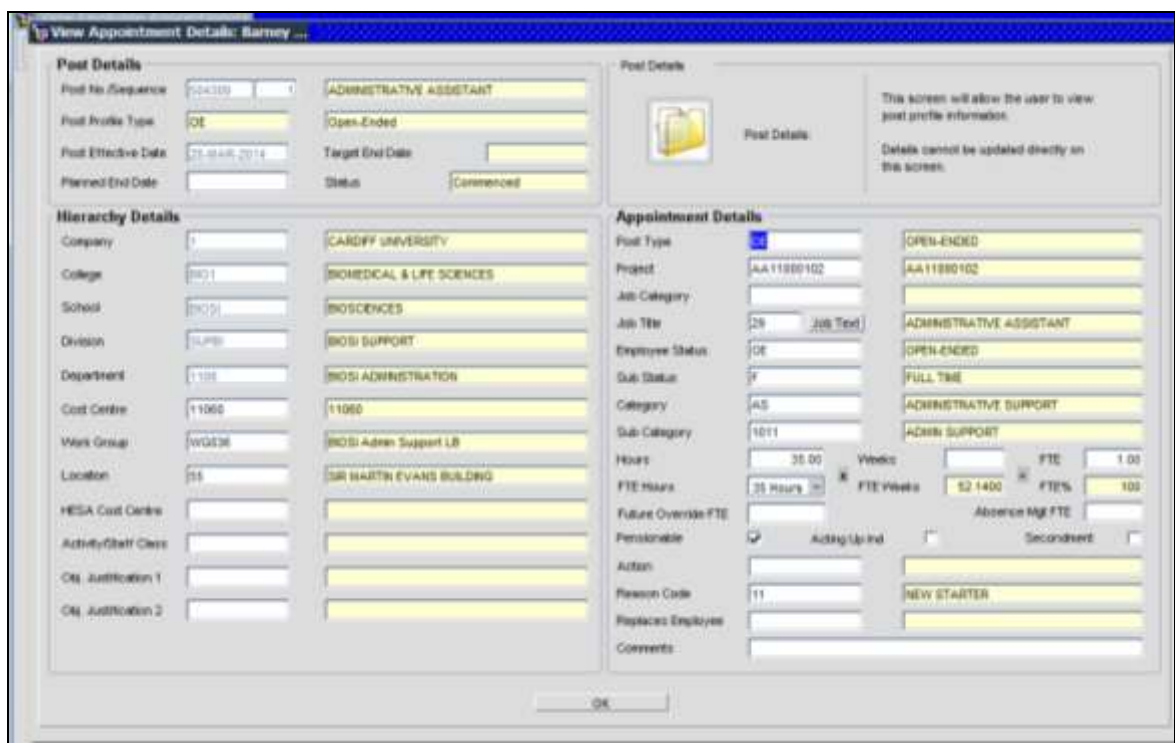
**View Employee Appointments**

Employee: Employee No. **10144002** **BARNEY RUBBLE**

**Appointment History 504309.1**

Appointment Status	Start Date	End Date	Target End Date	Post Number	Action	Reason	History	Obj. Justification 1
Comment	20-04-2014			504309	1	NEW STARTER	<input type="checkbox"/>	
							<input type="checkbox"/>	
							<input type="checkbox"/>	
							<input type="checkbox"/>	
							<input type="checkbox"/>	
							<input type="checkbox"/>	
							<input type="checkbox"/>	

6. The appointment details are now displayed



**View Appointment Details: Barney ...**

**Post Details**

Post No./Sequence: **504309** **1** **ADMINISTRATIVE ASSISTANT**

Post Profile Type: **OE** **Open-Ended**

Post Effective Date: **20-04-2014** **Target End Date:** **Planned End Date:** **Status:** **Commenced**

**Hierarchy Details**

Company: **1** **CARDIFF UNIVERSITY**

College: **001** **BIOLOGICAL & LIFE SCIENCES**

School: **0051** **BIOLOGICAL SCIENCES**

Division: **0051** **BIOLOGICAL SUPPORT**

Department: **1100** **BIOLOGICAL ADMINISTRATION**

Cost Centre: **11000** **11000**

Work Group: **W0036** **BIOLOGICAL Admin Support LB**

Location: **55** **SIR MARTIN EVANS BUILDING**

HESA Cost Centre: **Activity/Staff Class:** **Obj. Justification 1:** **Obj. Justification 2:**

**Appointment Details**

Post Type: **OE** **OPEN-ENDED**

Post: **AA11000102** **AA11000102**

Job Category: **29** **Job Text:** **ADMINISTRATIVE ASSISTANT**

Employee Status: **OE** **OPEN-ENDED**

Sub Status: **F** **FULL TIME**

Category: **AS** **ADMINISTRATIVE SUPPORT**

Sub Category: **1011** **ADMIN SUPPORT**

Hours: **35.00** **Weeks:** **FTE:** **1.00**

FTE Hours: **35 Hours** **FTE Weeks:** **52.1400** **FTE%:** **100**

Future Override FTE: **Personable:** **Acting Up/Ind:** **Secondment:**

Action: **Reason Code:** **11** **NEW STARTER**

Replaces Employee: **Comments:**

## How to see Changes in Salary

There are many types of salary amendments that the People Services Centre process all of which can be found on the employee's Pay Profile. If you have access to view pay profile you can see salary history, salary detail, allowance and any changes waiting for approval.

- 1- Select **Core Personnel** → **Maintenance** → **Personal Profile**
- 2- Search for the employee and double click on their name
- 3- Click on '**Pay Profile**'

The screenshot displays the 'CorePersonnel 16.2.1 - UAT' application window. The main title is 'Maintain HR Salary Amendments'. Below the title bar, there are search fields for 'Personal No.' (10141033) and 'Pay Group' (0000). The 'View Options' menu on the right shows 'Appointment Salary Details' selected. The 'Appointments' table lists the following data:

Start Date	End Date	Post No.	Status	Job Title	Post Type	FTE	Rate Of Pay	Allowances
01-JUL-2013		000014	COMMENCED	LIBRARY ASSISTANT	OPEN-ENDED	0.30	15303.00000	

Below the appointments table, there are tabs for 'Salary Details', 'Allowance Details' (highlighted with a red box), 'Show Outstanding', 'Show Rejected', and 'Overseas Salary'. The 'Allowance Details' tab is currently active, showing a table with columns: Effective Date, Input Code, Rate Effective, Pay Scale, Point, Rate Type, Rate Of Pay, Multiplier, Actual Pay, Status, and Reason. The table is currently empty.

- 4- The default page will show details of the basic pay on any current appointments. If there are any allowances against this post, you will see them by clicking the '**Allowance Details**' tab.

## Incremental Date

- 1- Increment details can be found by selecting '**Salary Detail**' from the top right option box.

**CorePersonnel 16.2.1 - UAT**

Action Edit Block Field Record Query Help Tools Window

**Maintain HR Salary Amendments**

Personnel No: 10141033 BRUCE FORSYTH  
 Pay Group: 0000 Core Test

View Options:  
 Appointment Salary Details  
**Salary Detail**  
 Allowance Details  
 Amend Pay Group

View Current Appointments  
 Include Outstanding Approvals

Buttons: Edit Details Add Search Clear

**Appointments**

Start Date	End Date	Post No
01-JUL-2013		000014

Buttons: Salary Details Allowance Details

**Salary Details**

Personnel No: 10141033 BRUCE FORSYTH  
 Effective Date: 01-AUG-2013 Expiry Date: 23-AUG-2013  
 Date Input: 01-AUG-2013  
 Pay Rate Type: Scale Point  
 Pay Scale: JRG2 GRADE 2 PT 6-10  
 Post: 6  
 Comments:

Rate: Annual  
 Rate Of Pay: 15303.00 Annualised Pay: 15303.00  
 Multiplier: 03000  
 Actual Pay: 465.65 Actual Annualised Pay: 465.65  
 Total Salary (including Allowances): 465.65

**Increment Details**

Increment Due Date: 01-JUL-2014  
 Comments:  
 Qualification Int: ☐ History  
 Increment Hold Int: ☐ Save Increment Changes

**Allowances**

Allowance	Allowance Type	Scale Point/Percentage	Value	Annual Value	Start Date	End Date	Reason

Close



## Chapter 4 - Recording Leave & Absence

### Planned Leave

When new Core Portal is live if an employee wishes to make a leave request or highlight planned absence other than sickness absence, this will be done via Core Portal (the employee self-service module). Staff with the relevant organisational roles in Core will be able to do this on an employee's behalf in Core Time. This includes, but is not limited to;

- Maternity Leave/Paternity/Adoption Leave
- Sickness absence
- Special Leave
- Career breaks/Study leave

If any of the leave or absence types above have salary implications, Central HR will process the changes and notify the Salaries section.

For any leave requests made through Core Portal, a notification will be sent to the Line Manager to approve. If approved, the leave request will automatically update the back office view in Core Time.

### Sickness Absence

#### Overlapping Absence

It is not possible to have overlapping absences in Core and the system will warn you if you are entering an absence that is the same as another already stored in the system. If you need to add new absence codes you will have to amend or delete the previous record before you can enter the new record.

*For example, if you have an open absence against **Sick Self Cert** and after seven days you need to add **Sick Fit Note** in, you will be forced to end the **Sick Self Cert** absence before you can enter the **Sick Fit Note** start date. This ensures that there are no overlapping records and that an employee's absence is not double counted.*

The system will not allow you to enter absence that goes beyond the anticipated end date of a contract. So if you have somebody on a fixed term contract who is absent and their contract is renewed beyond the anticipated end date you will have to go back into the system and extend the absence period by removing the end date entered against the absence record.

Sickness absence will have to be recorded by an Absence Administrator using Core Time's back office functionality as it is not currently possible to record this leave type through Core Portal.



## **Substantive/Non Substantive Appointments**

If an individual has multiple appointments both the substantive appointment Manager and non substantive appointment Manager will be able to record sickness absence against the appointment applicable to their School/Department.

When portal goes live both Managers will be able to record the absence which relates to their School or Department only.

## **Sickness Management Recording**

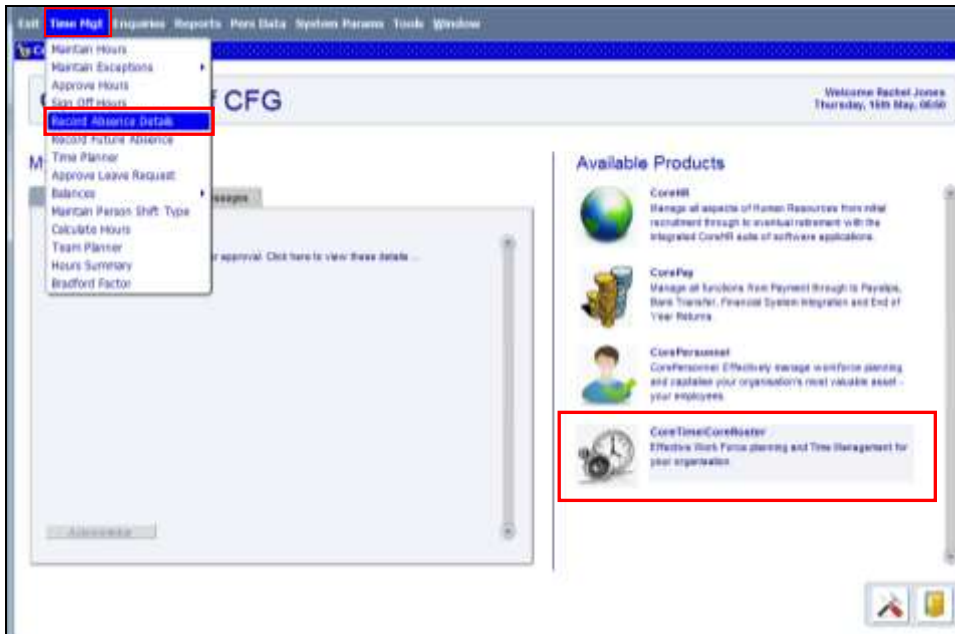
Phased Returns should be recorded in Core time and also within Core Personnel under the Sickness Management User Defined Field (UDF) details of which appear later in this manual.


If an individual reaches a Bradford Factor trigger point where an informal or formal sickness interview is required, these details should be recorded in Core Personnel within the Sickness Interview User Defined Field (UDF).


## Adding Sickness Absence to an Employee Record in Core Time

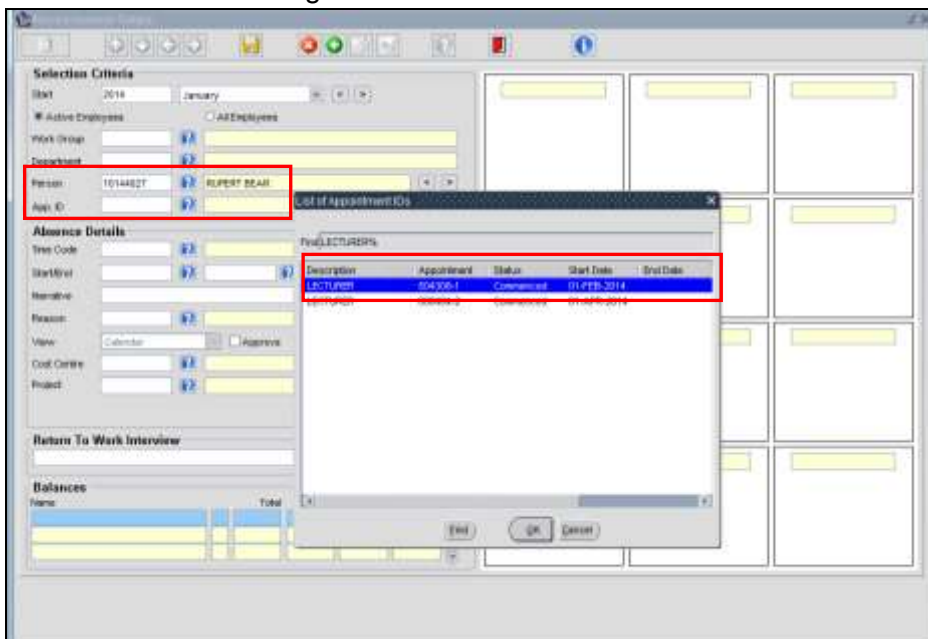
### Recording a Self Certificate Absence Record and Partial Sickness Absence


- 1- Select **Core Time** → **Time Management** → **Record Absence Details**



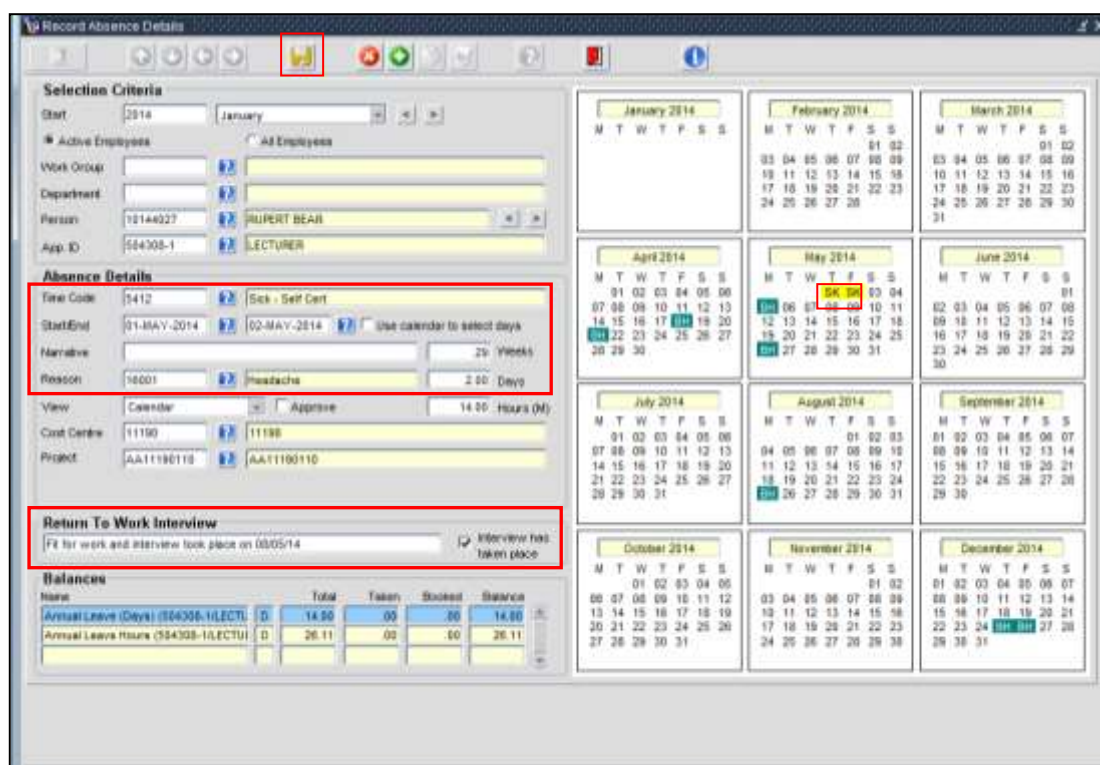
- 2- In the **Person** field use the  to find the employee record you need to change

3. Select the relevant appointment ID (if applicable) using the  for the appointment the sickness is to be recorded against



4. In the **Time Code** field select the sick – self certificate or sickness – partial day pay code as the absence type you are recording
5. In the **Start/End Date** field enter the relevant date(s) **Please note: The user calendar to select day's box should only be used if you are recording sickness absence for a period of 1 day**
6. Check that the system's calculation of the number of days of absence matches your own by reviewing the numbers of days entry submitted by the system
7. In the **Reason** field enter the reason for the absence
8. The cost centre and project code will automatically populate once the record is saved (this information will be the same as the cost centre and project code which is against the appointment)
8. In the **Narrative box include any further details relating to the absence**
9. Record any details of the return to work interview within the free text box e.g., date return to work interview took place and tick the interview has taken place box
10. Click  to save. Once you have done this, the relevant dates will be marked on the calendar as SK for Sick – Self Cert or SC for sickness – partial day

\*Partial Sick days should be recorded separately but are not included in the Bradford Factor Score



**Record Absence Details**

**Selection Criteria**

Start: 2014 January

Active Employees: ☐ All Employees

Work Group:

Department:

Person: 10146027 ALBERT BEAN

App ID: 544305-1 LECTURER

**Absence Details**

Time Code: 1412 Sick - Self Cert

Start/End: 01-MAY-2014 02-MAY-2014 Use calendar to select days

Narrative:  29 Weeks

Reason: 10001 Headache 2.00 Days

View: Calendar ☒ Approval 14.00 Hours (H)

Cost Centre: 11190 11190

Project: AA11190110 AA11190110

**Return To Work Interview**





Fit for work and interview took place on 03/05/14 ☒ Interview has taken place

**Balances**

Name	Total	Taken	Scaled	Balance
Annual Leave (Days) (544305-1/LECTU)	14.00	00	00	14.00
Annual Leave Hours (544305-1/LECTU)	26.11	00	00	26.11

## Recording Fit Note Absences

After seven days' continuous absence recorded against a self-certificate, if the employee is still absent due to sickness then the absence code will need to change to Sickness by Fit Note.

- 1- Select **Core Time** → **Time Management** → **Record Absence Details**
- 2- In the **Person** field use the  to find the employee record you need to change
3. Select the relevant appointment ID (if applicable) using the  for the appointment the sickness is to be recorded against
4. **Close the self certificate sickness record** (enter the date of the last day of self cert)
5. Insert a new record by clicking 
6. In the **Time Code** field select the Sick – fit note (Dr Cert) pay code as the absence type
7. In the Start date field enter the date the fit note starts, leave the end date blank, until the employee returns to work. Please don't record the receipt of multiple sick notes here, this information should be recorded in the Sickness Management User Defined Field (UDF)
8. In the **Narrative** and **Reason** boxes include any further details relating to the absence
9. The cost centre and project code will automatically populate once the record is saved (this information will be the same as the cost centre and project code which is against the appointment)
10. Record any details of the return to work interview within the free text box e.g. date return to work interview took place and tick the interview has taken place box
11. Click  to save. Once you have done this the relevant dates will be marked on the calendar

To enter historical absence you can repeat exactly the same steps as outlined above.

This screen shot is for an individual who has multiple appointments, therefore the days related to the appointment ID are highlighted

Other forms of absence/leave can be entered using the same steps as outlined above. For absence other than sickness it may not be necessary to enter a reason.



If you change the start month and year (if applicable) within the selection criteria part of the screen this will give you more of an overview of previous months' absence records.



## Phased Return

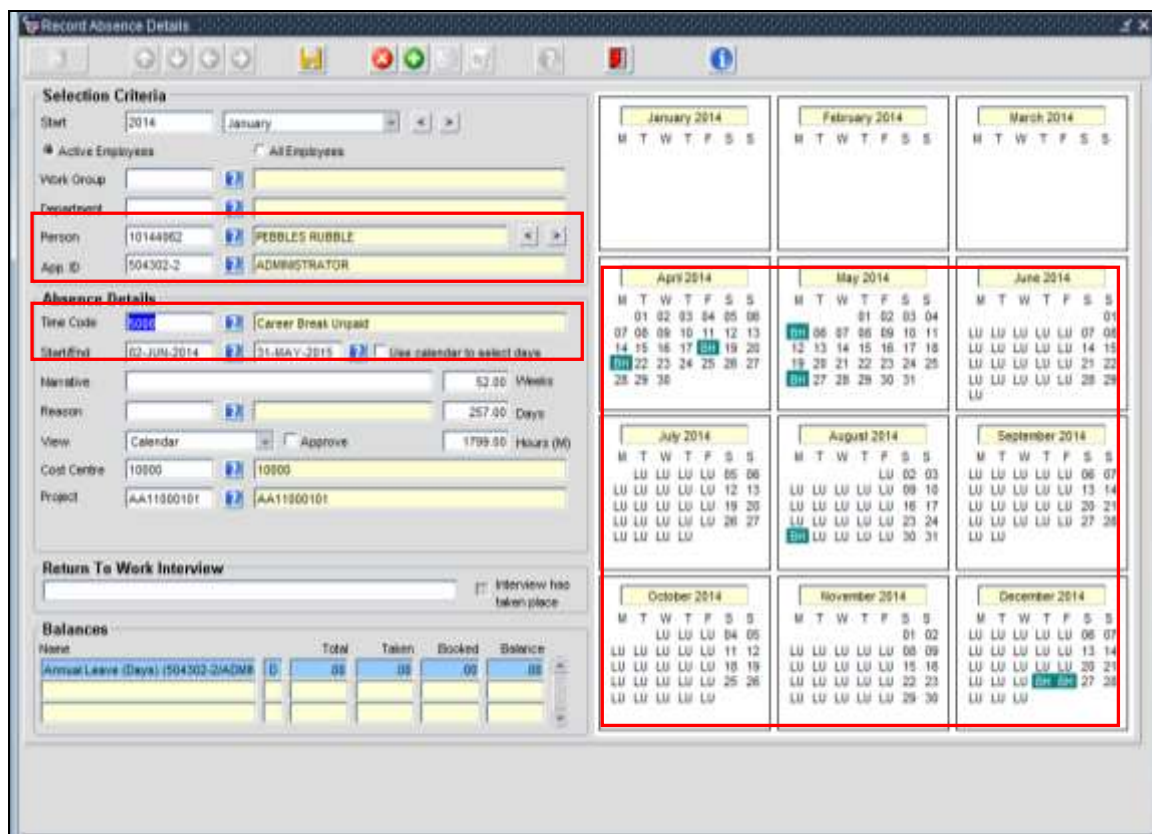
When an employee has been absent they may return to work on a phased return which will temporarily reduce the amount of time at work. A phased return will enable the smooth transition back to work after absence and be appropriate for a relatively short period of time.

- 1- Select **Core Time**→ **Time Management** →**Record Absence Details**
- 2- Find the employee you need to record details against and close the current sickness record within Core Time
- 3- Following the employees' return to work, record any details of the return to work interview within the free text box, and indicate that the employee is on Phased Return. Ensure the 'interview has taken place' box has been ticked
- 4- Complete the relevant Sickness Management User defined fields in Core Personnel
- 5- Please contact Salaries if an individual has exhausted all of their sickness entitlement to establish if the phased return will have an impact on their pay

## Unpaid Leave

Unpaid leave, for example Career Break requests, will be processed in the current way and the People Services Centre will be responsible for updating the individual's record within Core Time. If however, you notice that this hasn't been reflected within Core Time you are able to amend this yourself.

- 1- Select **Core Time**→**Time Management**→**Record Absence Details**
- 2- In the Person field use the  to find the employee record you need to change
- 3- Select the relevant appointment ID (if applicable) that the leave is being recorded against
- 4- In the Time code field select the relevant absence type you are recording e.g., Career Break Unpaid
- 5- In the Start and End date fields choose the relevant absence dates
- 6- Click  to save. Once you have done this the relevant dates will be marked on the calendar e.g. Career Break Unpaid will be shown as LU as indicated below




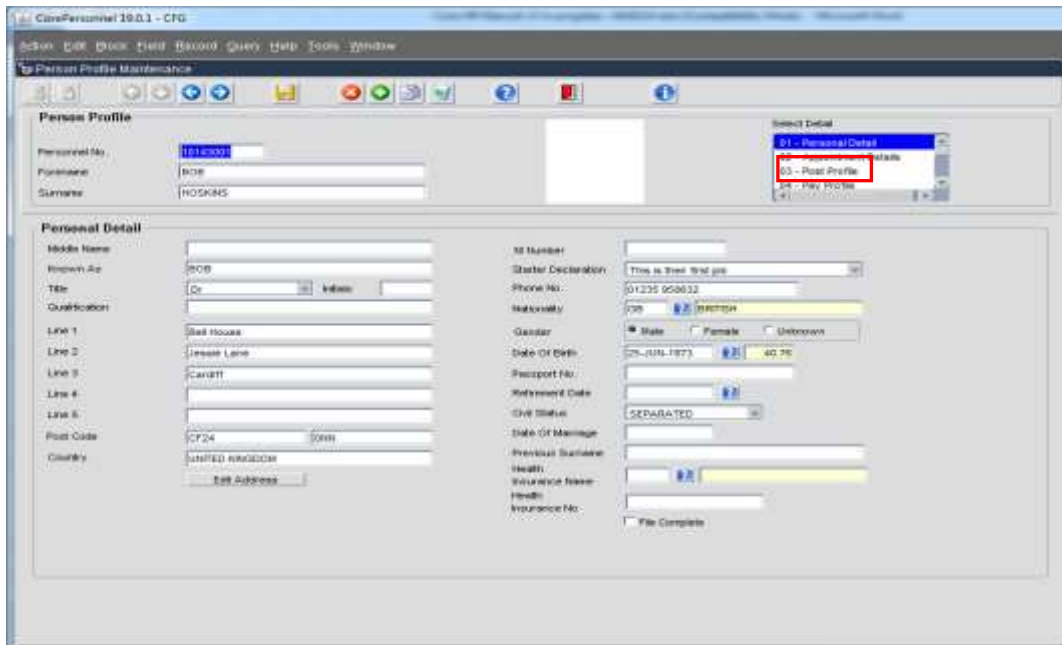
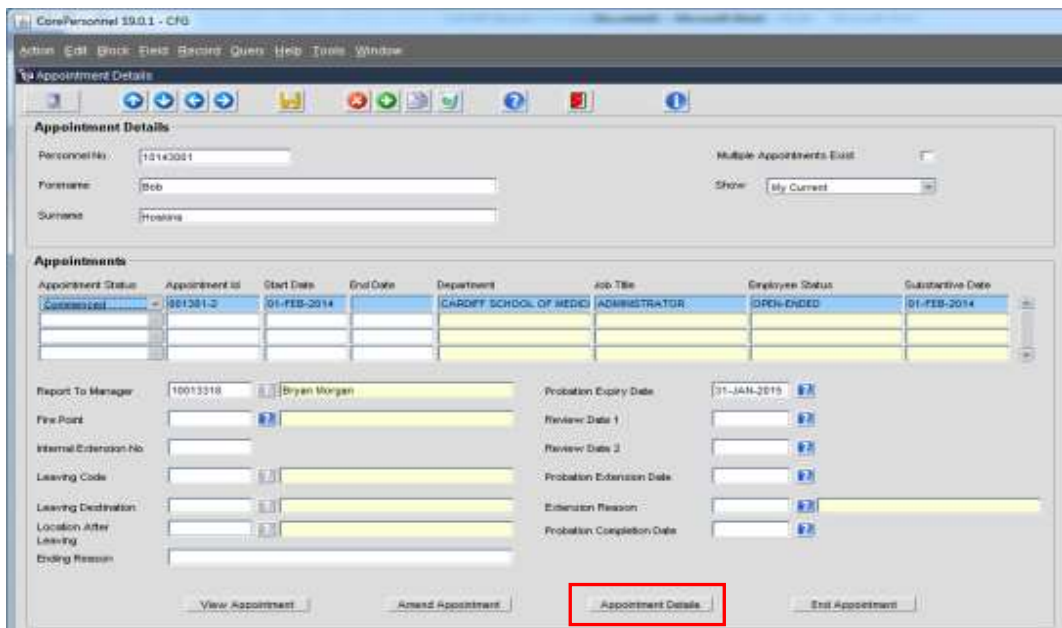


## Sickness Management User Defined Fields

The sickness management user defined fields should be used to record details of the following:

- One User Defined Field for each fit note received
- Details of any Occupational Health referrals

- 1- Select **Core Personnel** → **Maintenance** → **Personal Profile** → Find the employee you are looking for by using the  button and follow the steps below
- 2- Select **Post Profile** and click on **Appointment Details** to view the relevant appointment

Appointment Status	Appointment ID	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Completed	001381-2	01-FEB-2014		CARDOFF SCHOOL OF MEDIC	ADMINISTRATOR	OPDN ENDED	01-FEB-2014



- 
- Core Personnel 19.0.1 - CPO**
- Action Edit Block Field Record Query Help Tools Window
- Post Appointment Maintenance**
- Post Appointment**
- Post Number/Seq: 001581 2 55 ADMINISTRATOR
- Post Profile Type: OE OPEN-ENDED Status: COMPLETED
- Company: 1 CARDIFF UNIVERSITY
- College: BIC1 BIOMEDICAL & LIFE SCIENCES
- School: MEDC MEDICINE
- Division: MEDC CARDIFF SCHOOL OF MEDICINE
- Department: 1247 CARDIFF SCHOOL OF MEDICINE
- Cost Centre: 11000 11000
- Work Group: WGR53 MEDIC Appearance group 1
- Location: 72 TENOVAUS INSTITUTE
- HESA Cost Centre: 72
- Activity/Staff Class: 72
- Org. Justification 1: 72
- Org. Justification 2: 72
- Date: 21-FEB-2014
- Pension %: 1.00
- FTE: 100
- FTE%: 100
- Project: AA11000151 AA11000151
- Alt Text:
- Selection:
- 1 - Planned Appointment
  - 2 - Actual Appointment
  - 3 - Award Pay Rate
  - 4 - Award Appointment
  - 5 - User Data
  - 6 - Comments
  - 7 - Status Detail
  - 8 - View Employee Appointments
  - 9 - View Position History
- Planned Appointment**
- Planned Start Date: 21-FEB-2014
- Planned End Date: 21-FEB-2014
- Planned Post Type: OE OPEN-ENDED
- Planned Pay Details Not Required: [X]
- Planned Pay Rate Type: Scale Point
- Planned Pay Scale: GMB GRADE 6 PT 20-30
- Planned Point: 30
- Planned Salary: 20726.00
- Planned Multiplier: 1.000000
- Reason For Planning Post:

Page 105 of 132

- 4- Complete the relevant fields on the form to record the information

For the Sickness Management UDF, the fields are as follows

The screenshot shows the 'CorePersonnel 18.0.1 - CRG' application window. The 'Post Appointment' section at the top includes fields for Post Number/Seq (001001), Post Profile Type (OE), Status (OPEN-ENDED), Date (31-FEB-2014), and Selection (1 - Planned Appointment). The 'User Maintenance' dialog box is open, displaying 'User Data' for Personnel No. 10143001 and Job Name. The 'Sickness Management' section contains fields for Date From and Date To, both highlighted with red boxes. Below these are several rows of data entry fields for various sickness management details. The 'Planned App' section on the left lists various appointment details. The 'OK' button at the bottom of the dialog is also highlighted with a red box.

For the Sickness Interview UDF, complete the fields indicated below




The screenshot shows the 'CorePersonnel 18.0.1 - CRG' application window with the 'Sickness Interview' UDF form open. The 'User Data' section shows Personnel No. 10143001 and Job Name. The 'Sickness Interviews' section contains fields for Date From and Date To, both highlighted with red boxes. Below these are several rows of data entry fields for various sickness interview details. The 'Planned App' section on the left lists various appointment details. The 'OK' button at the bottom of the dialog is also highlighted with a red box.

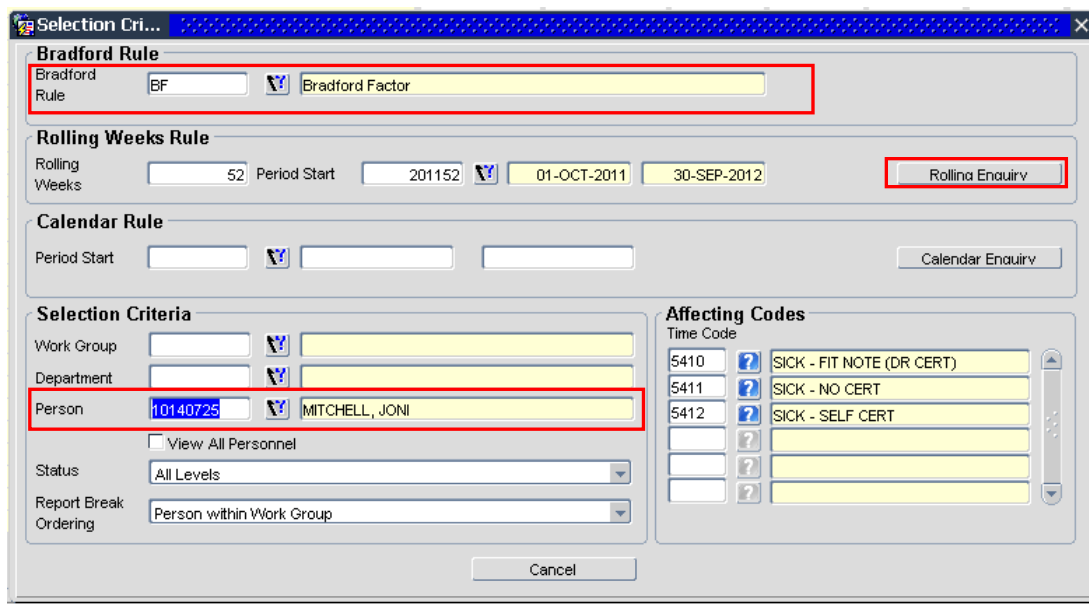
**Note:** It is important to insert the date the sickness interview was held in the **Date To** field as this is where report information is run from

## Viewing Bradford Factor Scores

The system is set to calculate the Bradford Factor score for a twelve month period. The score takes into consideration absences coded against Sick No Pay, Sick Self Cert and Sick Fit Cert. The system does not discount long term sick leave, disability related sickness or maternity related sickness from the calculation, however, you can run a report from Business Objects which will itemise an employee's sickness absence record.

### To run a Bradford Factor query in Core

- 1- Select **Core Time**→ **Enquiries**→**Bradford Factor Enquiries**
- 2- In the **Bradford Factor** field, use the  to select the rule- it will always be **BF- Bradford Factor (all)**
- 3- In the **Person** field use the  to select the employee you wish to enquire on. Alternatively this can be done on a whole Workgroup or Department basis and you can use the  on the **Workgroup** or **Department** fields to select against these



**Selection Criteria**

**Bradford Rule**  
Bradford Rule: BF  
Bradford Factor


**Rolling Weeks Rule**  
Rolling Weeks: 52  
Period Start: 201152  
01-OCT-2011 to 30-SEP-2012  
Rolling Enquiry

**Calendar Rule**  
Period Start:   
Calendar Enquiry

**Selection Criteria**  
Work Group:   
Department:   
Person: 10140725 MITCHELL, JONI  
View All Personnel  
Status: All Levels  
Report Break Ordering: Person within Work Group

**Affecting Codes**  
Time Code  
5410 SICK - FIT NOTE (DR CERT)  
5411 SICK - NO CERT  
5412 SICK - SELF CERT

Cancel

- 4- Click back to the **Rolling Weeks** section if you need to change the calculation period for the Bradford Factor. Use the  to select the relevant period you wish to review. What you choose will depend on the date of the absence you wish to review. It may not be possible to get the exact dates you wish to review as the system is set to calculate on working weeks. Choose the week in which the absence occurred and the system will calculate back 12 months from the week that you select. For example if somebody was sick on 12 October 2012 and you wanted to find their Bradford Factor score for the previous 12 month period you would need to select the calendar period that started on 8 October 2012 to 14 October 2012. The system would then calculate the Bradford Factor score for the period 15 October 2011 to 14 October 2012

- 5- Press ***Rolling Enquiry***
- 6- The screen output can be produced as a ***Report*** or the information can be ***Exported to Excel*** by pressing either of the two button options. This function is particularly useful if you are calculating scores for a team or department

Period	Name	From	To	Days	Sickness	Score	Status	Rollins
01-01-2012	Agné Mitchell	01-MAY-2012	30-SEP-2012			0.00	0	Is

## Running a Bradford Factor Report via Business Objects

Bradford Factor reports can be run via Business Objects.

- 1- Log into Business Objects using your network user name and password
- 2- Select the Documents Folder, then the Public Folder
- 3- Core Schools and Professional Services Folder
- 4- Select Bradford Factor Search by Criteria
- 5- To run a report for an employee enter their employee number click on Enter staff employee number
- 6- Enter the employees HR number in the 2<sup>nd</sup> box and click on the > button
- 7- Click on the Run Query button at the bottom of the screen
- 8- Once the report has finished the Sickness Absence Summary record appears which provides an overview of the Bradford Factor Score
- 9- Click on the Absence Detail tab to obtain specific sickness absence details

**Prompts**  
Reply to prompts before running the query.

Enter School: (optional) This filter will be ignored because no value has been selected.
Enter staff employee number (optional) This filter will be ignored because no value has been selected.
Enter Department Department: (optional) This filter will be ignored because no value has been selected.

**Enter School:**

Type values here >

Refresh Values <

To see the content of the list, please click the Refresh values button.

Enter your search pattern here

Run Query Cancel


The below is information which the report provides when you run a report on an individual, the same information is provided if you run the report at a School/Professional Service level the only difference is that you will receive a long list of this information


If you click on the Sickness Summary tab this is the information you will receive

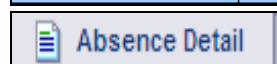
Description	Reason	Absence Start Date	Absence End Date	Absence Days	Long Term	Return to Work Interview Taken Place	Return to Work Interview Date
-------------	--------	--------------------	------------------	--------------	-----------	--------------------------------------	-------------------------------



If you click on the Absence detail tab this is the information you will see below


Bradford Factor							
<i>This report will list staff who have a Bradford Factor score greater than 0</i>							
Person Reference	Name	School	Division	Bradford Factor score	Managment Standards	Proce	dure

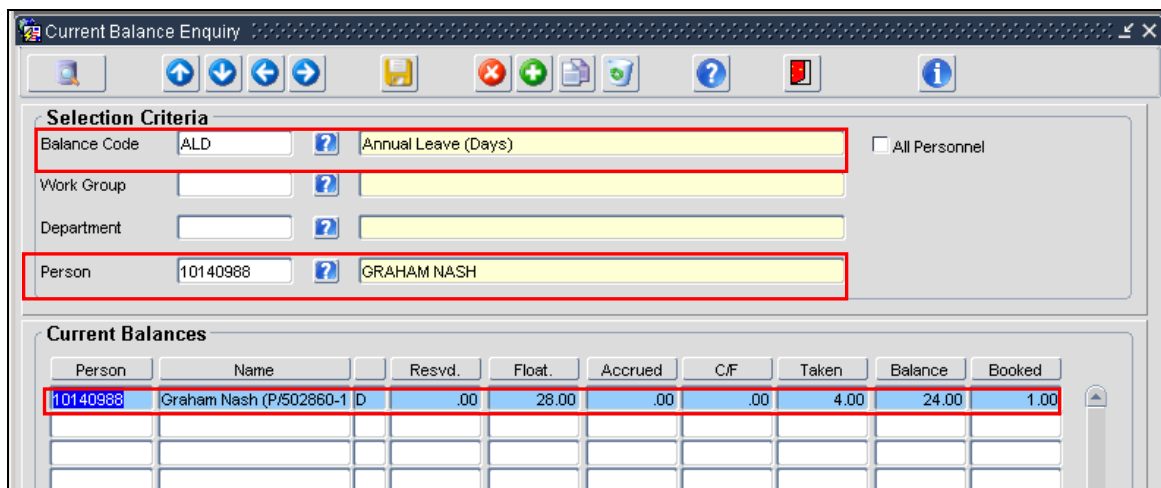
Bradford Factor							
<i>This report will list staff who have a Bradford Factor score greater than 0</i>							
Person Reference	Name	School	Division	Bradford Factor	Absence Days	Instances	



## Checking Annual Leave Entitlements in Core Time

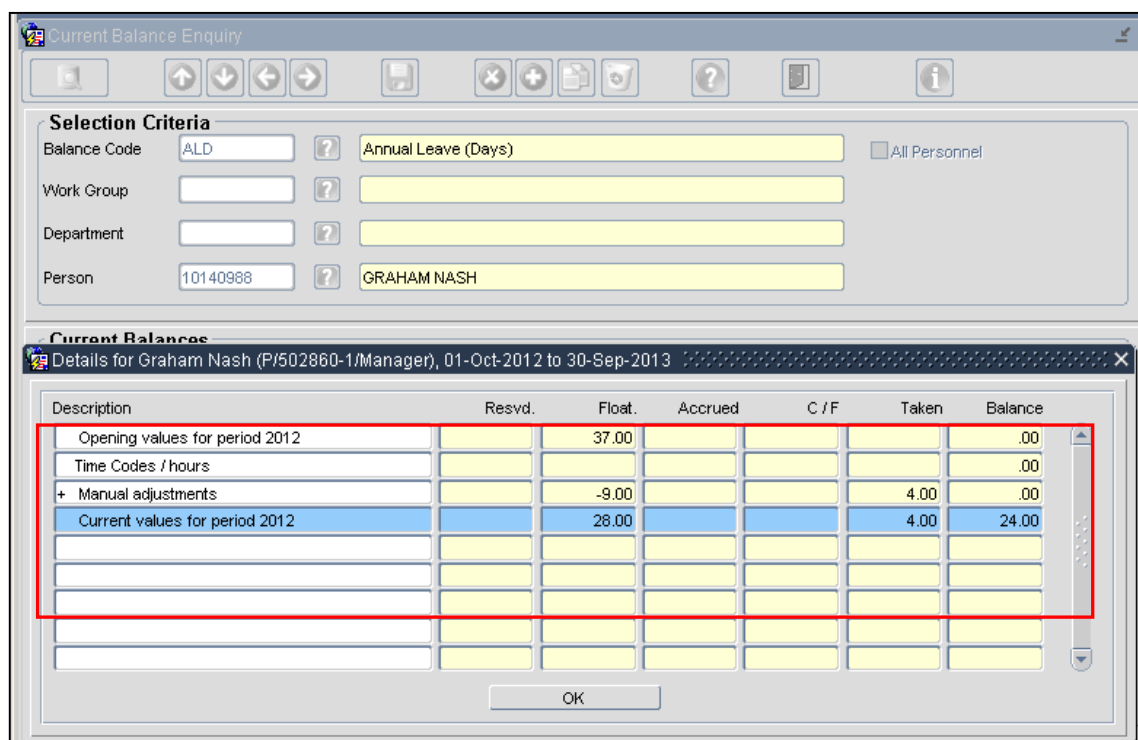
Within Core Time it is possible to view an employee's leave balance including any days taken and any outstanding balances.

- 1- Select **Core Time** → **Enquiries** → **Current Balance Enquiry**
- 2- Enter the **Balance Code** (this will either be **ALD** for Annual Leave Days or **ALH** for Annual Leave Hours). Enter the employee number of the individual you are looking for or alternatively, use the  function on the **Person** field to find the employee



Person	Name	Resvd.	Float.	Accrued	C/F	Taken	Balance	Booked
10140988	Graham Nash (P/502860-1)	.00	28.00	.00	.00	4.00	24.00	1.00

- 3- Double click against the highlighted blue line for the leave balance to drill down to more detail. Where a **+** sign appears next to a line on the drilled down details this suggests that further drill downs are possible



Description	Resvd.	Float.	Accrued	C / F	Taken	Balance
Opening values for period 2012		37.00				.00
Time Codes / hours						.00
+ Manual adjustments		-9.00			4.00	.00
Current values for period 2012		28.00			4.00	24.00

Details for Graham Nash (P/502860-1/Manager), 01-Oct-2012 to 30-Sep-2013						
Description	Resvd.	Float.	Accrued	C / F	Taken	Balance
Opening values for period 2012		37.00				.00
Time Codes / hours						.00
-- Manual adjustments						
01-OCT-12 to 31-DEC-12 @ 100% (92/365 days)		-9.33				.00
4 days annual leave taken					4.00	.00
Rounding		.33				.00
Current values for period 2012		28.00			4.00	24.00

OK

This is an example where a manual adjustment has been made for annual leave as the individual started employment part way through the annual leave year.

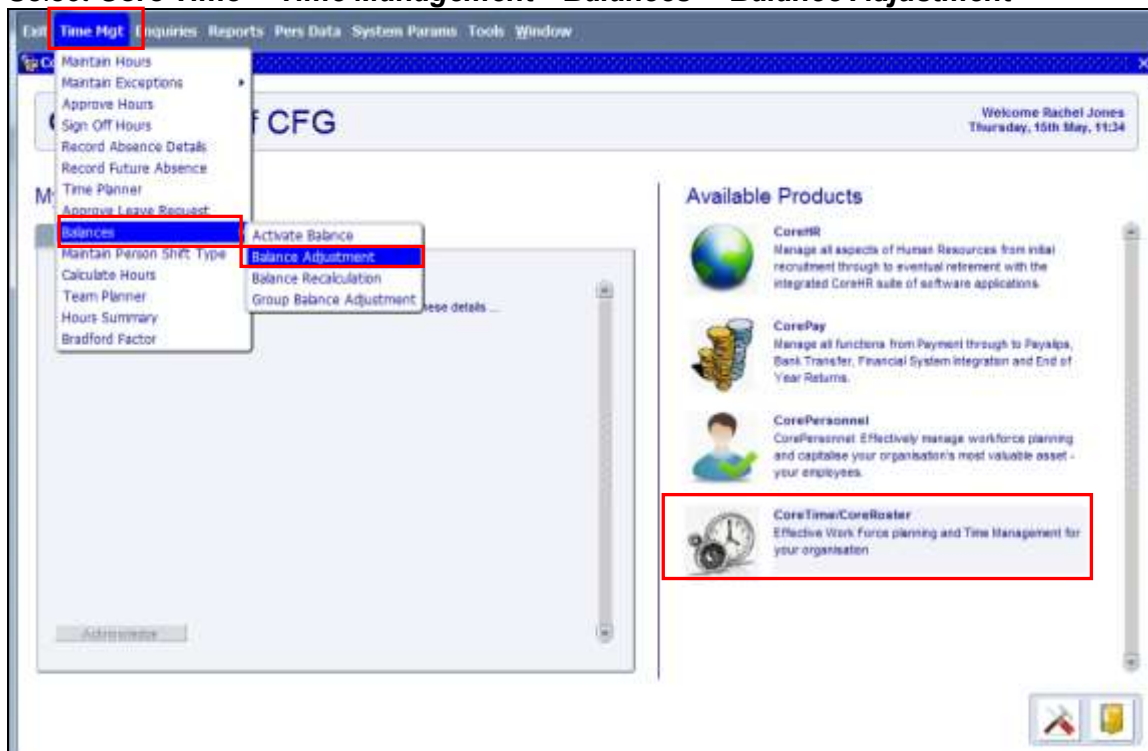



## Amending Leave Entitlement in Core Time

This is used to add or deduct leave balances available to a member of staff. For example, if an employee has not used all of their annual leave and are carrying over up to a maximum of 5 days annual leave from one leave year to the next. You will be required to amend their annual leave entitlement in Core Time. This will be an **important** annual task which will need to be carried out at the beginning of each leave year to ensure that employees' annual leave entitlement is accurate. This information will feed directly into Portal. Employees will also be able to see their leave entitlement when logging into Portal individually.

If however an employee's leave entitlement needs **amending due to a contractual change**, for example, an increase/decrease in hours or a change in career pathway, this will be the responsibility of the People Services Centre to amend.

- 1- Select **Core Time** → **Time Management** → **Balances** → **Balance Adjustment**



- 2- Find the employee you are looking for using the  function on the **Person** field
- 3- Select the code associated with the **Balance** field- ALD for Annual Leave Days or ALH for Annual Leave Hours (details of any days allocated for bank holidays or reserved balances will appear in the **Adjustments** section of the screen and details of the individual's leave entitlements will appear in the **Current Balances** section of the screen)



**Balance Adjustm...**

**Selection Criteria**

Person: 10140575 HILDA FREDA OGDEN

Balance: ALD Annual Leave (Days) (P/502573-1/ALUMNI RELATION)

Period: 2012 01-OCT-2012 30-SEP-2013

**Calculate**

Calculate

**Adjustments**

Period	Date Effective	Start Date	End Date	Affecting Element	Adjustment	Narrative
?	?	?	?			
?	?	?	?			
?	?	?	?			
?	?	?	?			
?	?	?	?			

**Current Balances**

Name	Reserved	Floating	Accrued	C / F	Taken	Balance	Booked
Annual Leave (Days) (P/502573-1/ALUMNI F	.00	32.00	.00	.00	.00	32.00	.00


- 4- In the **Adjustments** section of the screen click into the **Period** field on a blank line and select the relevant leave year from the options available. Click **OK**

**Balance Periods**

Find: 200%

Period	Start Date	End Date
2010	01-OCT-2010	30-SEP-2011
2011	01-OCT-2011	30-SEP-2012
2012	01-OCT-2012	30-SEP-2013
2013	01-OCT-2013	30-SEP-2014
2014	01-OCT-2014	30-SEP-2015

Find OK Cancel

- 5- Enter the **Date Effective** field for the current leave year, select the **Affecting Element** option and enter the appropriate adjustment
- 6- Enter any relative information in the **Narrative** column then click  to save.

**Selection Criteria**

Person
10140575
?
HILDA FRED A OGDEN

Balance
ALD
?
Annual Leave (Days) (P/502573-1/ALUMNI RELATION)

Period
2012
01-OCT-2012
30-SEP-2013

**Calculate**

Calculate

**Adjustments**

Period	Date Effective	Start Date	End Date	Affecting Element	Adjustment Narrative
2012	13-NOV-2012	01-OCT-2012	30-SEP-2013	Carried Forward	5.00

**Current Balances**

Name	Reserved	Floating	Accrued	C / F	Taken	Balance	Booked
Annual Leave (Days) (P/502573-1/ALUMNI F	.00	32.00	.00	.00	.00	32.00	.00

## Leave Balance Recalculation

If an employee's hours of work change for any reason, the annual leave balance will need to be recalculated as this does not happen automatically and will need to be processed to correspond with the change to the employees' personal record.

For full time staff that work 5 days per week and 7 hours per day, leave balances will be displayed in days. For all part-time staff or for staff who work different hours per day, the leave balances will be displayed in hours.

You will never need to do a leave balance recalculation as this will be done by the People Services Centre at the same time that another change is processed.

## **Chapter 5- Probation**

Once a new employee or new post record has been entered in Core by the People Services Centre, the probation expiry date will automatically be generated by the system using the start date and terms and conditions to determine the relevant date.

### **1 Year Probation**

An automated notification will be sent to the line manager from the system advising them when the initial probation meeting is due and this will be sent within 7 days of the start date. The email will include a weblink to the relevant documentation which needs to be completed and returned to the People Services Centre. The People Services Centre will then process the paperwork and update the User Defined Fields accordingly.

Notifications will be sent to the line manager when the 5 and 9 month probation review meetings are due. Both notifications will be sent through the system with the weblink to the relevant documentation for completion and return to the People Services Centre.

### **3 Year Probation**

An automated notification will be sent to the line manager from the system advising them when the initial probation meeting is due and this will be sent within 7 days of the start date. The email will include a weblink to the relevant documentation which needs to be completed and returned to the People Services Centre. The People Services Centre will then process the paperwork and update the User Defined Fields accordingly.

Notifications will be sent to the line manager when the 12, 24 and 30 month probation review meetings and final report are due. Notifications will be sent through the system with the weblink to the relevant documentation for completion and return to the People Services Centre.

With both schemes once the relevant documents have been completed you are required to send these onto the People Services Centre who will input the relevant information under the Probation UDF. You are able to access the Probation UDF, for viewing only, by following the steps below.

- 1- Log into **Core Personnel**→**Maintenance**→**Personal Profile**
- 2- Find the person you want to view details for and on the **Person Profile Maintenance** screen select **Post Profile**.

Core Personnel 19.0.1 - CFG

Person Profile Maintenance

Personnel No: 10143001

Forename: BOB

Surname: HOCKEY

Select Detail:

- 01 - Personal Detail
- 02 - Appointment Details
- 03 - Post Profile**
- 04 - Pay Profile

Personal Detail

Mobile No:

Known As: BOB

Title: Dr

Qualification:

Line 1: Bell House

Line 2: Jessie Lane

Line 3: Cardiff

Line 4:

Line 5:

Post Code: CF24

Country: UNITED KINGDOM

IS Number:

Start Declaration: This is their first job

Phone No: 01235 968032

Nationality: GB

Gender: Male

Date Of Birth: 25-JUN-1973

Passport No:

Retirement Date:

Civil Status: SEPARATED

Date Of Marriage:

Previous Surname:

Health Insurance Name:

Health Insurance No:

File Complete

- 3- Ensure that the correct appointment is selected. Select **Appointment Details**

Core Personnel 19.0.1 - CFG

Appointment Details

Personnel No: 10143001

Forename: BOB

Surname: HOCKEY

Multiple Appointments Exist: ☐

Show: My Current

Appointments

Appointment Status	Appointment No	Start Date	End Date	Department	Job Title	Employee Status	Substitutive Date
<b>Current Appointment</b>	001381-2	01-FEB-2014		CARDIFF SCHOOL OF MED	ADMINISTRATOR	OPEN-ENDED	01-FEB-2014

Report To Manager: 10013318

First Point:

Internal Extension No:

Leaving Code:

Leaving Destination:

Location After Leaving:

Ending Reason:

Probation Expiry Date: 31-JAN-2015

Review Date 1:

Review Date 2:

Probation Extension Date:

Extension Reason:

Probation Completion Date:

View Appointment

Amend Appointment

**Appointment Details**

End Appointment

- 4- Using the Selection menu on the right hand side select **User Data** then choose **Probation** to view any data for the employee that has been entered by the People Services Centre

The screenshot shows the 'Post Appointment Maintenance' window in the CorePersonnel 19.0.1 - CFG application. The window is divided into several sections. On the right, a 'Selection' menu is open, listing options: 1 - Planned Appointment, 2 - Actual Appointment, 3 - Amend Pay Rate, 4 - Amend Appointment, 5 - User Data (highlighted with a red box), 6 - Comments, 7 - Status Detail, 8 - View Employee Appointments, and 9 - View Position History. The main area of the window contains fields for 'Post Appointment' details, including Post Number/Seq, Post Profile Type, Status, Date, Pension %, FTE, and FTE%. Below this, there are fields for 'Planned Appointment' details, including Planned Start Date, Planned End Date, Planned Post Type, Planned Pay Details Not Required, Planned Pay Rate Type, Planned Pay Scale, Planned Point, Planned Salary, Planned Replaces Employee, Reason For Planning Post, and Planned Multiplier.

The screenshot shows the 'User Maintenance' window in the CorePersonnel 19.0.1 - CFG application. The window is divided into several sections. On the right, a 'Selection' menu is open, listing options: 1 - Planned Appointment, 2 - Actual Appointment, 3 - Amend Pay Rate, 4 - Amend Appointment, 5 - User Data (highlighted with a red box), 6 - Comments, 7 - Status Detail, 8 - View Employee Appointments, and 9 - View Position History. The main area of the window contains fields for 'Post Appointment' details, including Post Number/Seq, Post Profile Type, Status, Date, Pension %, FTE, and FTE%. Below this, there are fields for 'Planned Appointment' details, including Planned Start Date, Planned End Date, Planned Post Type, Planned Pay Details Not Required, Planned Pay Rate Type, Planned Pay Scale, Planned Point, Planned Salary, Planned Replaces Employee, Reason For Planning Post, and Planned Multiplier. A 'Select User Defined Field' dialog box is open, showing a table with columns: Source, User Defined Field, From Date, To Date, and Description. The table is empty. The dialog box has buttons for 'New', 'View/Edit', and 'Close'.

## Entering Appraisal Data to a UDF

On an annual basis there will be a need to enter appraisal data to the Appraisal UDF. This follows the same principle as all other UDF's.

- 1- Select **Core Personnel** → **Maintenance** → **Person Profile**
- 2- Find the person you want to view details for and on the Person Profile Maintenance screen select **Post Profile** and ensure that the correct appointment is selected. Select **Appointment Details**.
- 3- Using the Selection menu on the right hand side select **User Data** then choose **Appraisal Data** to enter data for the employee.
- 4- Complete the relevant fields
- 5- Click **OK**

The screenshot shows a software window titled "User Maintenance". Inside, there is a section for "User Data" with fields for "Personnel No" (10140988) and "Graham Nash". Below this is the "Appraisal Data" section. It contains several input fields: "Date From", "Date To", "Date of review", and "Appraised by". The "Date From" and "Date To" fields are highlighted with a red box. The "Date of review" and "Appraised by" fields are also highlighted with a red box. To the right of these fields is a vertical list of yellow boxes, each with a question mark icon. At the bottom of the window are buttons for "OK", "Delete", "Cancel", and "Letters".

It is important to enter the date that the interview took place in the '**Date To**' field as this information may be used to drive notifications in the future.

## Probation and Appraisal Report

Core can give you individual information about probation and appraisal but there may be times when you need information about the whole School /Professional Service. You can run a probation and appraisal report via Business Objects. If you do not have access to Business Objects /or have access but not to the relevant folders please contact the People Services Centre and MIS will be able to provide you with this (following receipt of an authorised Data Access Agreement Form).

Courses on how to use Business Objects are run by INSRV on a regular basis. A brief reminder on how to gain access is provided below:

- 1- Log into Business Objects using your network user name and password.
- 2- Select the Documents Folder, then the Public Folder
- 3- Core Schools and Professional Services Folder
- 4- Select the Appraisal Folder
- 5- The report will then be generated and along the bottom of the report you can choose from the tabs in the below list which will provide you with a list of employees who are relevant to each.
  - On probation or having completed Probation within the last 12 months
  - Appraisal within 15 Months
  - Appraisal within 15 – 24 Months
  - No Appraisal Data Recorded



## Frequently Asked Questions

QUESTION	ANSWER	Module	TOPIC
How do we set up a Post-retirement rejoinder?	Process as a standard 'new starter' but make sure the pensionable element is not ticked for the person. The post could be pensionable but the person would no longer be eligible (see scenario 15 for details of how to process).	Core Personnel	Appointing a person to a post
If an employee receives an increment during the course of a responsibility allowance, is the difference automatically calculated?	No. In Core, responsibility allowances will be added to an employee's record as a monthly amount that will have to be manually calculated then re-calculated from the effective date of the change in salary.	Core Personnel	Changes
What happens if you make a change to a record, save it, then make another change with the same effective date?	It will not show up as a separate record- the latest record will overwrite the first but will retain the changes you made originally so only one record assimilating all changes will be visible.	Core Personnel	Changes
Who is responsible for changing cost allocations once an employee has been appointed?	Schools will now be responsible for managing cost allocation (funding code) changes.	Core Personnel	Changes
Will I be warned if I miss a mandatory field/step?	Yes. You will receive a prompt to tell you which mandatory field has been missed when you try and save the work you have entered.	All	General/ Navigation
Are mandatory fields marked in a specific colour?	No, but you won't be able to proceed to the next screen without completing mandatory fields- the system will prompt you if there are any you have missed.	All	General/ Navigation
If casual staff are auto-commenced by Schools, at which point is the A&I check carried out?	This will still be carried out by the School. Although casual posts are auto-commenced, they will still need to be authorised by the salaries section before payment is made. Payment will not be made unless the A&I check has been carried out.	Core Personnel	General/ Navigation
Who can allocate Organisational roles?	School manager role holders are able to allocate organisational roles to employees in their School	Core Personnel	Organisational Roles

Do some organisational role type's override others i.e. would a School Manager role have the same and more access than an Absence Administrator role?	Yes. If someone has a School Manager role this would allow them access to the absence administration functionality so you would not need to allocate this separately.	Core Personnel	Organisational Roles
Who will decide what role employees will hold?	Schools/Directorates have already returned a document specifying how roles should be allocated. These roles will be added to Core for existing staff before go-live, but the maintenance and addition of new records will be the responsibility of Schools/Directorates	Core Personnel	Organisational Roles
Can you add to the number of FTE's in a Post once created?	Yes- see instructions in chapter 4 (Changes)	Core Personnel	Post Management
For jointly funded posts, who will be responsible for entering the cost allocation?	Each school will add their own portion of the funding to the cost allocation screen.	Core Personnel	Post Management
Will employees still need to fill in a SAN form for FINCE/AUDIT purposes?	Yes. There is no facility for an employee to submit their sickness absence information via the Portal. The current Sickness absence procedure must be followed so employees must still complete and submit a SAN form. The information will be recorded by an Absence Administrator in Core.	Core Time	Recording Leave & Absence
Does the annual leave entitlement that is visible in the Core Portal automatically deduct Christmas Closure days?	Yes. A breakdown of the complete leave entitlement is visible in the employee portal, along with details of deductions for closure days, booked leave and remaining leave.	Core Time	Recording Leave & Absence
When entering leave onto the system, can the date range cross between two appointments?	No - if (for example) an employee has had their hours reduced with an effective date of 5th November, the previous appointment will have ended on the 4th November. A date range entered cannot cross over these two dates because the system will not 'know' what appointment you want to apply the leave against. You will need to create two separate entries - one to cover the period up to and including 4th November and another with effect from 5th November.	Core Time	Recording Leave & Absence
Can we record open-ended absences?	Yes	Core Time	Sickness Absence
Will the system prompt on open absences?	No	Core Time	Sickness Absence

## Appendices

### Appendix 1- Organisational Roles

#### **1. What is an organisational role?**

Core works on the basis of position management and assigns individuals to posts established against a defined organisational hierarchy. Organisational roles are used to describe “duties” or “roles” that the occupant of each role will be expected to undertake. All employees will have the organisational role of “Employee” but some may also carry other organisational roles depending on the position they occupy. For example, somebody who manages a team will have the organisational role type of Employee and Line Manager allocated to them. Conferring an organisational role type on an employee extends to them certain security and functional privileges within the system and will determine what they can see and do on each part of the system.

#### **2. Why are organisational roles so important in Core?**

Processes within Core have been configured to rely on the assignment of organisational roles. Notifications and tasks assigned as part of each process will be sent to the person within each area who holds the organisational role specified. For example, in the Fixed Term Management procedure line managers will be sent a notification at an appropriate point in time reminding them that a fixed term review meeting is due for their member of staff. The person holding the organisational role type of line manager will receive this notification which might also be copied to the person or people holding the role type of School Manager. Getting this allocation of person to role type is critical and will ensure that the correct notification/task etc. is sent to the right person at the right time.

#### **3. Can a person hold more than one organisational role?**

There is no limit on the number of organisational roles that any one person can hold and these have been conferred upon the individual as approved by the Head of School/Directorate. The role allocated will normally be a direct requirement of the individual’s job description and the position they occupy.

#### **4. Can two people be given the same organisational role?**

It is possible for more than one person to hold the same role and for individuals to be able to delegate an organisational role to an alternate. For example in a School where the Head has determined that their School Manager will be responsible for approving all HR related requests, the Head of School will be allocated the organisational role of Head of School/Directorate with the same role then conferred to the School Manager.

#### **5. What organisational roles will we use within Core?**

Organisational roles have been developed to be as generic as possible (with some notable exceptions) meaning that the same role can be held by people across each part of the University. This ensures consistency in approach and means that occupants of exactly the same post can be allocated the same organisational role type en masse rather than this being allocated on an individual basis.

Within Core the following organisational role types are available for use for School and Directorate employees:

- Employee – automatically allocated
- Recruiter – managed within 2xB and allocated based on information already supplied
- Recruiter Approver – managed within 2xB and allocated based on information already supplied

- Head of School/Directorate
- School Manager
- School/Directorate HR
- School/Directorate Finance
- Line Manager – identified as part of the work group collection exercise
- Timesheet Approver 1 and 2 - identified as part of the work group collection exercise

A number of other roles have also been configured and are allocated to individuals within the Human Resources and Payroll divisions.

### Organisational Role Descriptions

Role	Typical Holder	What will they see? / What can they do?
Employee	Every employee	<b>See:</b> Their own data Amend their own data within the Employee Self Service section of Core Portal
Head of School/Directorate	Held by a Head of School/Directorate	<b>See:</b> Information specific to their School or Directorate. <b>Do:</b> Will have portal access to be able to review any manager requests routed to them for approval. May have back office access though this is likely to be restricted to specific screens and not widely available across all modules. This role can be held by nominated delegates if required. Tasks or notifications will appear to all people who hold the role and can be updated or actioned by either person. This role will hold final approval rights within a School/Directorate
School Manager	Typically held by the person within a School / Directorate who carries the "School Manager" type role	<b>See:</b> Information specific to their School or Directorate. <b>Do:</b> Super users within their own area who will have back office and portal access. This role is typically allocated to those who will be responsible for managing the establishment, creating and varying posts, appointing casual staff, external examiners, changing or varying funding codes etc.

School/Directorate HR	<p>Typically held by a person whose job it is to undertake or have a role in the approval of HR administration for a School or Directorate. It enables the holder to have access to information about those in their School/Directorate and may or may not enable them to see salary related information depending on the role that they undertake. Access to the “back office” might be possible depending on arrangements within the School/Directorate in which case the person might also hold the role of School Manager enabling them to have extended rights in the system</p>	<p><b>See:</b> All employees within their School/Directorate</p> <p><b>Do:</b> School/Directorate HR Administrators will generally be individuals who are involved in any HR related process within their area. They may or may not be involved in the internal approval process and/or be the person who is tasked by the School Manager to maintain the organisational hierarchy for the area. They may enter absence information, request changes to contracts, run reports to monitor fixed term contracts etc. CASUAL STARTERS</p> <p>This is a role with similar access to that of the School Manager but might not be involved in the budgeting elements of the HR processes and might, therefore, have limited access to salary/payroll information.</p>
School/Directorate Finance	<p>Typically held by a person whose job it is to undertake or have a role in the management of salary or staff associated budget related information for a School or Directorate. It enables the holder to have access to information about those in their School/Directorate. Access to the “back office” might be possible depending on arrangements within the School/Directorate in which case the person might also hold the role</p>	<p><b>See:</b> All employees within the School/Directorate. This role type may allow individuals to have view only access to some of the back office screens.</p> <p><b>Do:</b> Through Core Portal Finance Administrators may enter timesheet information for staff, approve timesheets as part of a workflow process, input casual starters, review budget information, review salary to grant proposals.</p>

	of School Manager enabling them to have extended rights in the system. This person might be the one to review all overtime or timesheet claims prior to submission to Payroll or proposed changes to salary	
Line Manager	<p>Will be held by a person who has line management responsibilities for staff. It enables the role holder to see limited information about the staff that they manage and to review leave requests submitted to them by their staff. This type of role holder will receive prompts from the system to undertake specific tasks (also common to other roles) and be required to use the Core Portal environment to approve requests and mark tasks as complete or pending. When phase 3 is complete this role holder will also be able to request changes to an employee's contract via Manager Requests.</p>	<p><b>See:</b> Limited information on all employees within the workgroup(s) they line manage. Team calendars will be visible and staff absence (no sickness information). Leave balances for staff will be available as will leave request history, training history and staff qualifications and skills. Future development will allow sight and completion of appraisal/probation documentation</p> <p><b>Do:</b> Approve/reject leave or training requests made via portal for staff they line manage and possibly enter absence or timesheets via portal (when the upgrade is implemented). Request changes to an employees' contract via Manager requests. Manage sickness returns and update return to work information via Portal (phase 2)</p>
Timesheet Approver 1 Timesheet Approver 2	Typically held by a person who has responsibility for the approval of hourly paid timesheets or overtime claims submitted by members of staff in their area. This may also be held by a member of staff in a School/Directorate who is responsible for	

	<p>completing timesheet returns on behalf of the staff within the School/Directorate.</p> <p>Security can be extended or limited as appropriate.</p> <p>There can be more than one timesheet approver if required and it is possible to accommodate areas where one person approves before being passed to another Timesheet Approver within the School/Directorate</p>	
Absence Administrator	<p>Typically held by the person or people who currently enter absence data into Compel if this is a different person to the School Manager or HR Administrator. The person will only have access to the specific screen in the Core “back office” that enables them to record the data for the area that they have authorisation to see</p>	<p><b>See:</b> Back office access to the Record Absence Details screen in Core Time for employees within their School/Directorate.</p> <p><b>Do:</b> Administrators will be able to enter sickness absence details for employees, record return to work interviews and approve or reject annual leave or other leave requests submitted through employee self-service.</p>

## Appendix 2- Absence Reason Codes within Core Time

The following absence reasons and time codes are available within Core Time for recording absence.

REASON CODE	REASON CODE DESCRIPTION	REASON CODE	REASON CODE DESCRIPTION
10000	Psychiatric Illnesses	21004	Hay fever (seasonal rhinitis)
10001	Anxiety	21005	Hearing loss
10005	Depression	21016	Throat infection
10006	Eating Disorder	21017	Tinnitus
10010	Panic Attacks	21018	Tonsillitis
10017	Stress	22000	Dental & oral problems
10099	Seasonal Affective Disorder (SAD)	23000	Eye problems
10100	Bipolar Disorder	24000	Endocrine/glandular problems
11000	Back Problems	24003	Diabetes - Insulin dependent
11001	Back ache/pain	24007	Thyroid disorders
11002	Disc problems	25000	Gastrointestinal problems
11004	Sciatica	25002	Appendicitis
12000	Musculoskeletal problems	25007	Crohn's disease
12001	Arthritis	25008	Diarrhoea
12002	Carpal tunnel syndrome	25012	Gall bladder disease
12008	Neck ache/pain	25017	Irritable bowel syndrome
12013	Repetitive strain injury (RSI)	25026	Ulcerative colitis
12020	Whole body vibration	25028	Vomiting
13001	Cold	25029	Food poisoning
13002	Cough	25030	Stomach ache
13003	Flu Influenza	26000	Gynaecological problems
14000	Asthma	26001	Period pains
14002	Allergic (extrinsic) asthma	26998	Genitourinary problems including kidney
15000	Chest & Respiratory problems	27000	Infectious disease
15002	Bronchitis	27015	Meningitis
15008	Pleurisy	27016	Mumps
15010	Pneumonia	27017	Chicken Pox
16001	Headache	27020	Shingles
16002	Migraine	28000	Muscular skeletal injury
17000	Cancer	28028	Laceration
17009	Leukaemia	28029	Sprain
18000	Blood disorders	28998	Fractured bone
18001	Anaemia	29000	Nervous system disorders
19000	Heart & Circulatory problems	29003	Epilepsy
19001	Angina	29006	Multiple Sclerosis
19002	Cardiovascular disease	30000	Pregnancy related conditions
19004	Cerebrovascular disease	30010	Miscarriage
19005	Deep vein thrombosis (DVT)	30011	Morning sickness
19011	Hypertensive disease	31000	Skin disorders
19014	Myocardial infraction	31003	Eczema
19020	Stroke	31005	Impetigo
20000	Burns	31007	Psoriasis
20998	Sun burn	32001	Alcoholism
21000	Ear/nose/throat problems		



40001	Phased return to work
40002	Altered hours
40003	Amended duties
99001	Hospital Appointment
99002	Dental Appointment
99003	Optician Appointment
99004	GP Appointment
99005	Physio Appointment
99984	Other - See Notes
99985	Vertigo
99986	Reaction to medication
99989	Glandular Fever
99990	Dizziness

99991	Debility
99992	Medical Appointment
99993	Rash
99994	Viral Infection
99995	Post-Operative Recovery
99996	Affective Disorder
99997	Partial Fitness (Fit Note)
99998	Bereavement
99999	Unknown
PAN00	Pandemic Flu

### Appendix 3 - Time Codes within Core Time

SHORT_NAME	NAME	PAY_CODE
A	ACCIDENT AT WORK - ABSENT	5406
A	FLEXIBLE WORKING REQUEST	5015
AB	LEAVE OF ABSENCE PAID	5002
AB	LEAVE OF ABSENCE UNPAID	5003
ACC	ACCIDENT AT WORK - NO ABSENCE	5407
AL	ANNUAL LEAVE	5001
AL	CLOSURE DAY	5420
BH	PUBLIC HOLIDAY	5107
HW	HOME WORKING	5018
LA	EXTREME CIRCUMSTANCES PAID	5408
LA	UNPAID LEAVE	5414
LP	ADDITIONAL ANNUAL LEAVE	5013
LP	ADOPTION LEAVE ORDINARY	5301
LP	BEREAVEMENT PAID	5009
LP	CAREER BREAK PAID	5007
LP	CIVIC/PUBLIC DUTIES PAID	5101
LP	CLINICAL ANNUAL LEAVE	5014
LP	DEPENDANT PAID	5011
LP	DISABILITY REL SICK-FIT NOTE	5403
LP	DISABILITY REL SICK-SELF CERT	5405
LP	DISABILITY RELATED LEAVE	5401
LP	DISABILITY RELATED SICKNESS	5402
LP	JURY & WITNESS SERVICE	5106
LP	KIT DAY	5312
LP	MAGISTERIAL DUTY	5105
LP	MATERNITY REL SICK - SELF CERT	5311
LP	MATERNITY REL SICK FIT NOTE	5309
LP	MEDICAL APPOINTMENT	5415
LP	PARENTAL LEAVE CHILD 2	5313
LP	PARENTAL LEAVE CHILD 3	5314
LP	PARENTAL LEAVE CHILD 4	5315
LP	PARTIAL DAY SUSPENSION	5417
LP	PATERNITY LEAVE ORDINARY	5307
LP	STUDY LEAVE PAID	5004
LP	TRADE UNION REPRESENTATIVE	5006
LP	VOLUNTEER RESERVE FORCES PAID	5103
LU	ADOPTION LEAVE ADDITIONAL	5302
LU	BEREAVEMENT UNPAID	5010
LU	CAREER BREAK UNPAID	5008
LU	CIVIC/PUBLIC DUTIES UNPAID	5102
LU	DEPENDANT UNPAID	5012
LU	DISABILITY REL SICK - NO CERT	5404
LU	EXTREME CIRCUMSTANCES UNPAID	5409

LU	MATERNITY REL SICK - NO CERT	5310
LU	SICK - NO CERT	5411
LU	STUDY LEAVE UNPAID	5005
LU	UNAUTHORISED ABSENCE	5413
LU	VOLUNTEER RESERVE FORCES UNPD	5104

## Appendix 4 - Where Do I find? – Tips to help you navigate around the system

### End Dates

- Planned End Date – The end date presumed at the point of appointment.  
**Found: Core Personnel, Maintenance, Personal Profile, Post Profile, Appointment Details.**

Note: If renewed, may not reflect 'planned' end date.

- Target End Date – Drives the redundancy committee report. Reflects the end of contract ONLY.  
**Found: Core Personnel, Maintenance, Personal Profile, Post Profile, Appointment Details, View Employee Appointments**
- Actual End Date - This appears only when someone is processed as a leaver.  
**Found: Core Personnel, Maintenance, Personal Profile, Post Profile,**
- Increment Dates - **Maintenance, Personal Profile, Person Profile Maintenance, Pay Profile, Salary Details**
- Discretionary Payments - **Core Personnel, Maintenance, Personal Profile, Pay Profile, Allowances**
- Visa information - **Maintenance, Personal Profile, Person Profile Maintenance, User Data, Visa Details**
- Continuous Service Date - **Maintenance, Personal Profile, Person Profile Maintenance, Continuous Service**
- Employment History / Start date - **Maintenance, Personal Profile, Person Profile Maintenance, View Employee History**
- Salary Details / History - **Maintenance, Personal Profile, Person Profile Maintenance, Pay Profile, Salary Details**